

Your Logo Here

Login

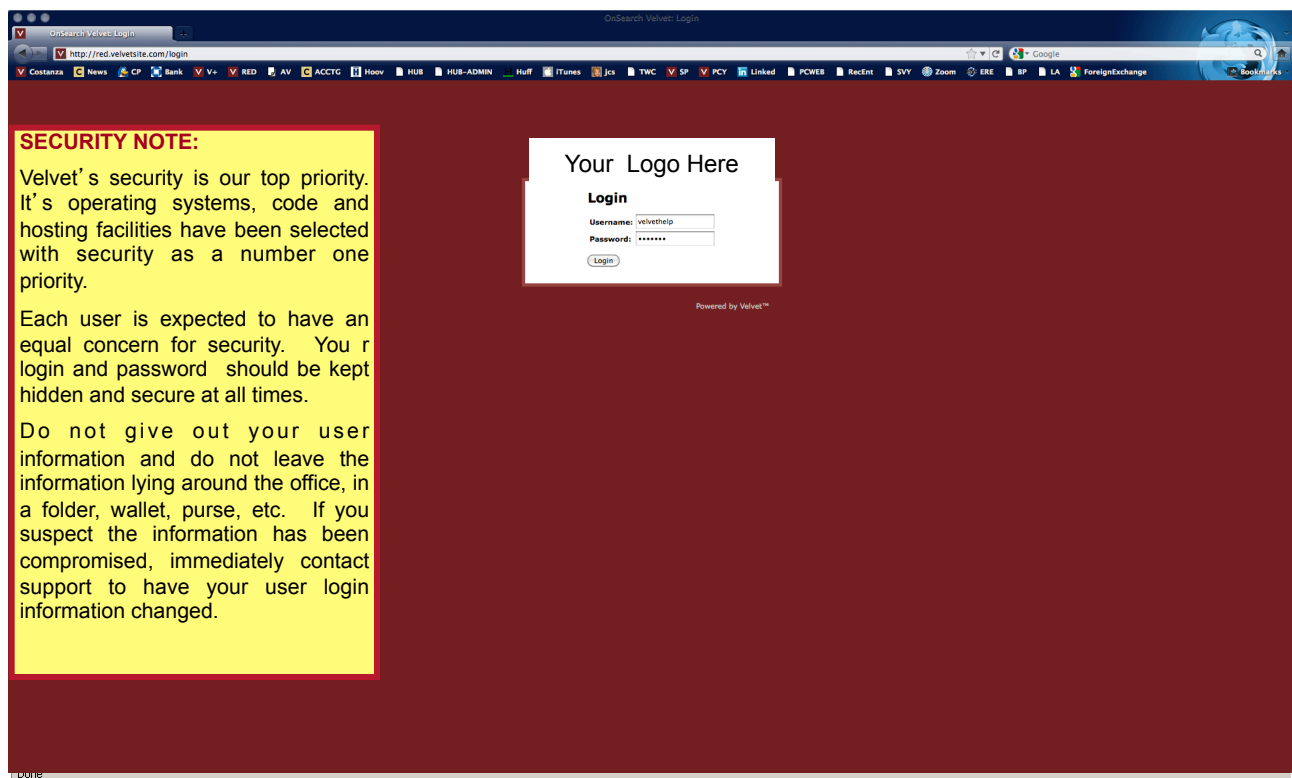
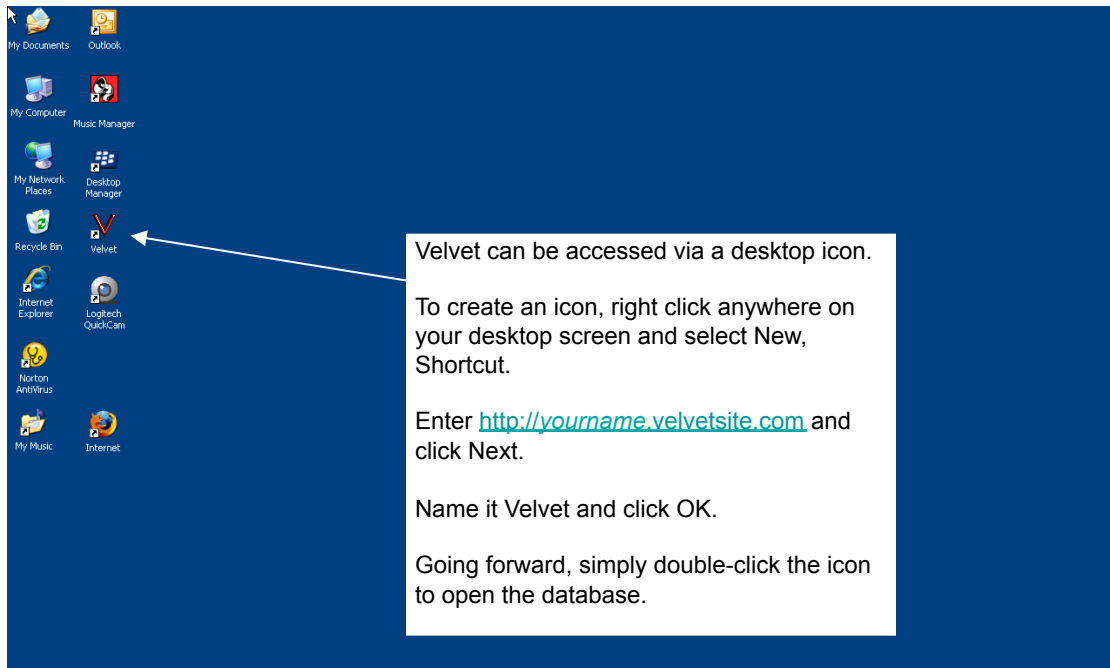
Username:

Password:

Login

Powered by Velvet™

Velvet



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Overview

Architecture

Velvet is a web-based search management system designed exclusively for each client. The system resides on a dedicated server located at a secure ISP. The web-based system is accessible from any location with a computer or smart device connected to the Internet.

Users need a login name and password to access the system.

Since the system is custom-developed for each client, many of its components address the specific processes of your firm. It is a system that can be improved continuously and we appreciate your feedback and contributions going forward.

Technical Specifications

Velvet's design is based on a proprietary design by Prospect City. These systems are developed in Ruby, Ruby on Rails, ActiveX, and other open source programs. The server's operating system is OpenBSD-based (another open source product). By building on the open source platform the system's are flexible yet secure, and do not rely on periodic upgrades and changes initiated by larger corporations such as Microsoft. Any issues raised during the life of the system can be immediately dealt with by professional, expert programmers available from a variety of sources led by our internal IT group.

Embedded Communications

Velvet is a database with the added ability to communicate to users via email and other tools. The system will often send alerts to users, delegate tasks to users, and deliver reports to users based on user interaction, firm preferences, etc. If you receive a communication from Velvet, it is based on criteria set in your user profile, including email address, function, role and status. Please contact administration or refer to this instruction manual if you have questions about these emails.

Security Issues

Velvet's security infrastructure is solid. It's operating systems and programming languages are used by leading corporations with both public-facing websites and internal web-based applications. However, system security is dependent on every user's ability to protect information and access.

Your user login name and password is extremely important. Take care of it as you would a credit card or debit card PIN number. If you feel the security of your access information has been compromised, please contact support immediately so the access information can be changed.

Support

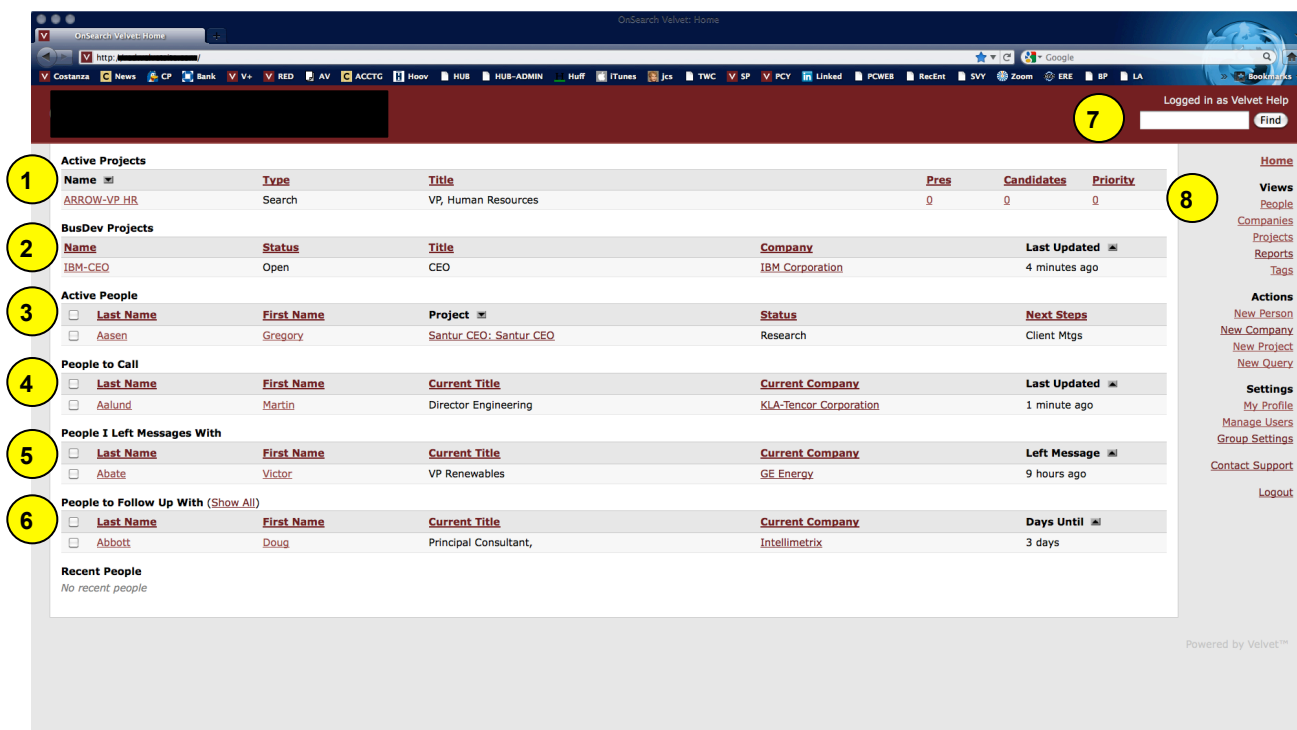
Because Velvet's design and supporting code is licensed by Prospect City, you have many options for support. Internally there will be power users in place to assist you with your needs, administrative assistants and researchers who can help, and the IT department personnel.

In addition, Prospect City is available to serve your needs via phone (847.487.4256) or via email (support@prospectcity.com). For connection-related issues, please contact your local IT team first.

HOME PAGE

In Velvet your home page is a central staging place where the user can easily view relevant information as it relates to their search work. It is recommended the home page be a regular starting point for users.

The home page is divided into sections relevant to your workload.



The screenshot shows the Velvet OnSearch Home page. The interface includes a top navigation bar with a search field (7) and a 'Find' button. The main content area is divided into several sections, each with a numbered callout:

- 1 Active Projects:** A table with columns: Name, Type, Title, Pres, Candidates, Priority. It lists one project: ARROW-VP HR.
- 2 BusDev Projects:** A table with columns: Name, Status, Title, Company, Last Updated. It lists one project: IBM-CEO.
- 3 Active People:** A table with columns: Last Name, First Name, Project, Status, Next Steps. It lists one person: Aasen, Gregory.
- 4 People to Call:** A table with columns: Last Name, First Name, Current Title, Current Company, Last Updated. It lists one person: Aalund, Martin.
- 5 People I Left Messages With:** A table with columns: Last Name, First Name, Current Title, Current Company, Left Message. It lists one person: Abate, Victor.
- 6 People to Follow Up With (Show All):** A table with columns: Last Name, First Name, Current Title, Current Company, Days Until. It lists one person: Abbott, Doug.
- 7 Find:** A search field in the top right corner.
- 8 Menu Bar:** A vertical sidebar on the right side of the page containing links to Home, Views, People, Companies, Projects, Reports, Tags, Actions, New Person, New Company, New Project, New Query, Settings, My Profile, Manage Users, Group Settings, Contact Support, and Logout.

- 1 Active Search Projects where the user is listed as a team member.
- 2 Active BusDev Opportunities where the user is listed as a team member.
- 3 Active People lists executives who's status is "candidate" or "interview-client" and have a "next step" selected in their profile. (on searches where you are listed as a team member)
- 4 People to Call indicates those individuals the user is assigned to call (assigned by others or assigned by the user themselves)
- 5 People I Left Messages With lists individuals the user attempted to call, but left messages
- 6 People to Follow Up With displays those individuals you have marked for follow up. These individuals only appear on this list when they are within 14 days of the scheduled follow up. To see all scheduled follow ups (including those beyond 14 days), click the ([Show All](#)).
- 7 Find field is used to find a person, company or project. Fields searched include title, memo, contact information, description. In addition, the system text-searches uploaded documents (resumes, too.)
- 8 Menu Bar contains links to navigate through the system.


ROUTING

Velvet's call processing is designed to move individuals from one list to another, eventually moving within a search pipeline as well.



ADDED TO THE USER'S CALL LIST – BY USER, RESEARCHER, LEVERAGE OR ADMIN.

People to Call

Last Name 

USER CLICKS ON PERSON NAME TO GO INTO THEIR RECORD. READ RECORD FIRST FOR DETAILS.

WHEN USER PICKS UP THE PHONE TO CALL THE PERSON, THEY SHOULD CLEAR THE USER NAME FROM THE CALL LIST DESIGNATION.

IF YOU REACH THE PERSON,



IN THE PERSON RECORD, SCROLL DOWN TO THE MEMO SECTION AND ADD PERTINENT COMMENTS. (SEE PERSON RECORD IN THIS MANUAL)

People to Follow Up With

Last Name

IF YOU INTEND TO FOLLOW UP WITH THE PERSON AT A LATER DATE, SELECT YOUR NAME IN THE FOLLOW UP SECTION OF THE PERSON RECORD (top), AND SET THE APPROPRIATE DATE.

IF YOU DO NOT REACH THE PERSON (VMAIL, FOR EXAMPLE)



IN THE PERSON RECORD, SELECT YOUR NAME IN THE LEFT MESSAGE FIELD (top).


People I Left Messages With

Last Name


First Name

SUMMARY ROUTE


People to Call

Last Name 	First Name	Current Title	Current Company	Current Project
Rosario	Isabella	VP, HR	ZZZ Chemical Company	07-SSP-CEO (Confidential)

People I Left Messages With

Last Name	First Name	Current Title	Current Company	Left Message 
Snowflake	Susie	COO	DEF Gaskets	11 hours ago

People to Follow Up With (Show All)

Last Name	First Name	Current Title	Current Company	Days Until 
Lincoln	Abe	CFO	GHI Plastics	2 days



Overview

Components of Velvet

The following components have been developed in Velvet:

Employee Directory

Within each user profile is information used to produce the employee directory. Please keep your profile information accurate to support this feature. (Menu: Settings, My Profile)

Companies

Velvet stores company data, general contact information, subsidiary links, employees, documentation, etc. In addition to this information, Velvet also stores and displays stock symbol and performance information. Users can access greater details of company information by clicking on the stock performance chart displayed in each record (of public companies). Doing so will open a new window with expanded company information provided by Yahoo!

People

People records in Velvet include contact information, career information, education information, memos (user comments) and supporting documentation. Within each person's record is listed any connection to search projects as well.

Projects

Velvet organizes data in project records, including people pipelines, documentation and search details. Project types include BusDev, Search, and Other. The type of project can be migrated from BusDev to search without creating new records. Therefore it is important to enter new business development opportunities in Velvet for the purpose of documentations storage and for tracking successes moving forward.

When a BusDev becomes a search project, the user can simply change the project "type" from BusDev to Project.

Documentation

Velvet stores documents in project files, people files, and company files. When uploading a document, Velvet "reads" the document, thus making it text-searchable in the future.

Examples include:

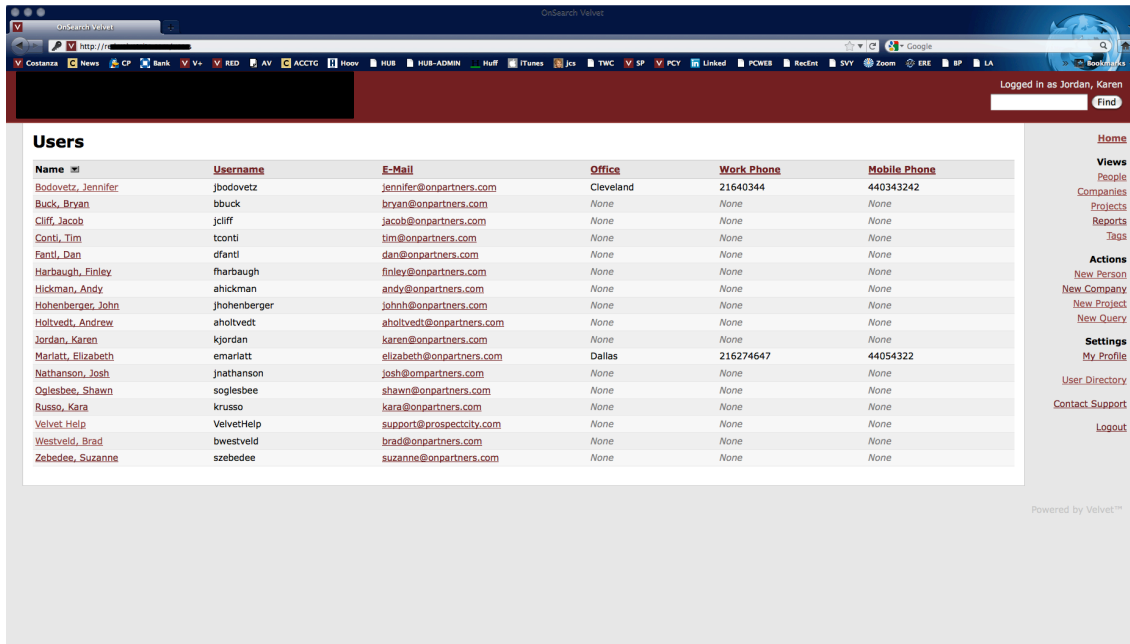
People: Resumes, Articles, Candidate Write-ups.

Companies: Organization Charts, Intelligence, etc.

Projects: Proposals, Position Description, Invoices, etc.

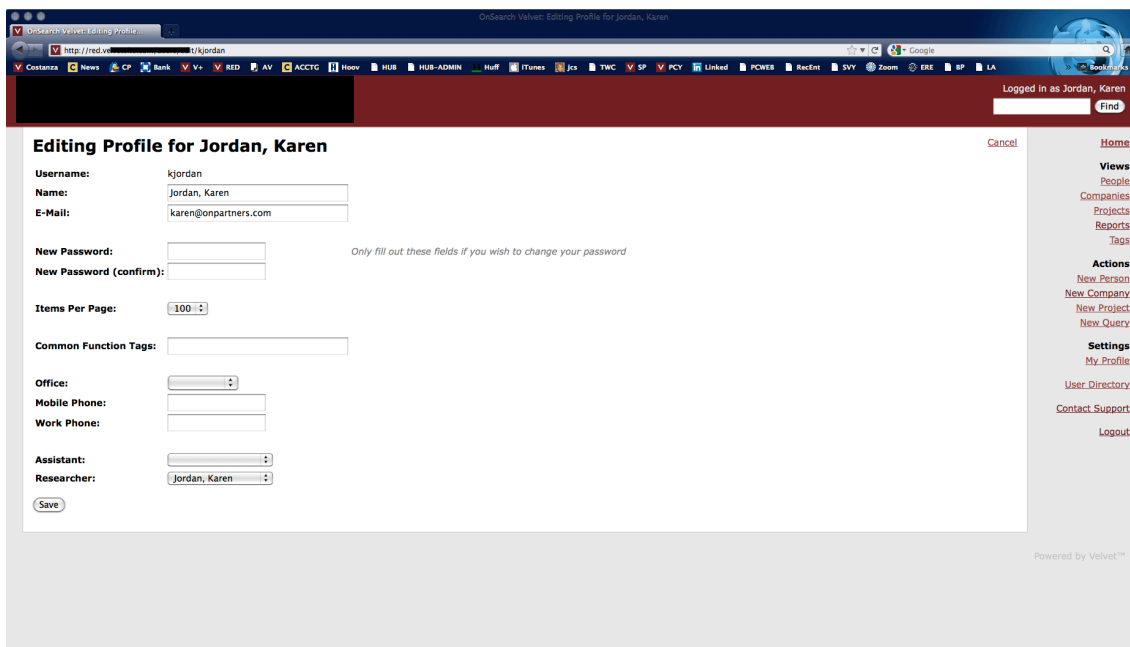
EMPLOYEE DIRECTORY

The user profiles include information helpful to others in the firm. This information is compiled to form an employee directory. On the right-side menu, click USER DIRECTORY.



Name	Username	E-Mail	Office	Work Phone	Mobile Phone
Bodovetz, Jennifer	jbodovetz	jennifer@onpartners.com	Cleveland	21640344	440343242
Buck, Bryan	bbuck	bryan@onpartners.com	None	None	None
Cliff, Jacob	jcliff	jacob@onpartners.com	None	None	None
Conti, Tim	tconti	tim@onpartners.com	None	None	None
Fanti, Dan	dfanti	dan@onpartners.com	None	None	None
Harbaugh, Finley	fharbaugh	finley@onpartners.com	None	None	None
Hickman, Andy	ahickman	andy@onpartners.com	None	None	None
Hohenberger, John	jhoenberger	johnh@onpartners.com	None	None	None
Holtvedt, Andrew	aholtvedt	aholtvedt@onpartners.com	None	None	None
Jordan, Karen	kjordan	karen@onpartners.com	None	None	None
Mariett, Elizabeth	emariett	elizabeth@onpartners.com	Dallas	216274647	44054322
Nathanson, Josh	jnathanson	josh@onpartners.com	None	None	None
Oglesbee, Shawn	soglesbee	shawn@onpartners.com	None	None	None
Russo, Kara	krusso	kara@onpartners.com	None	None	None
Velvet Help	VelvetHelp	support@prospectcity.com	None	None	None
Westveld, Brad	bwestveld	brad@onpartners.com	None	None	None
Zebedee, Suzanne	szebedee	suzanne@onpartners.com	None	None	None

To edit your information go to MY PROFILE and click EDIT in the upper right corner.



Note: User Passwords are encrypted and not accessible by administrators or Prospect City Support. If you lose your password, a new one must be created.

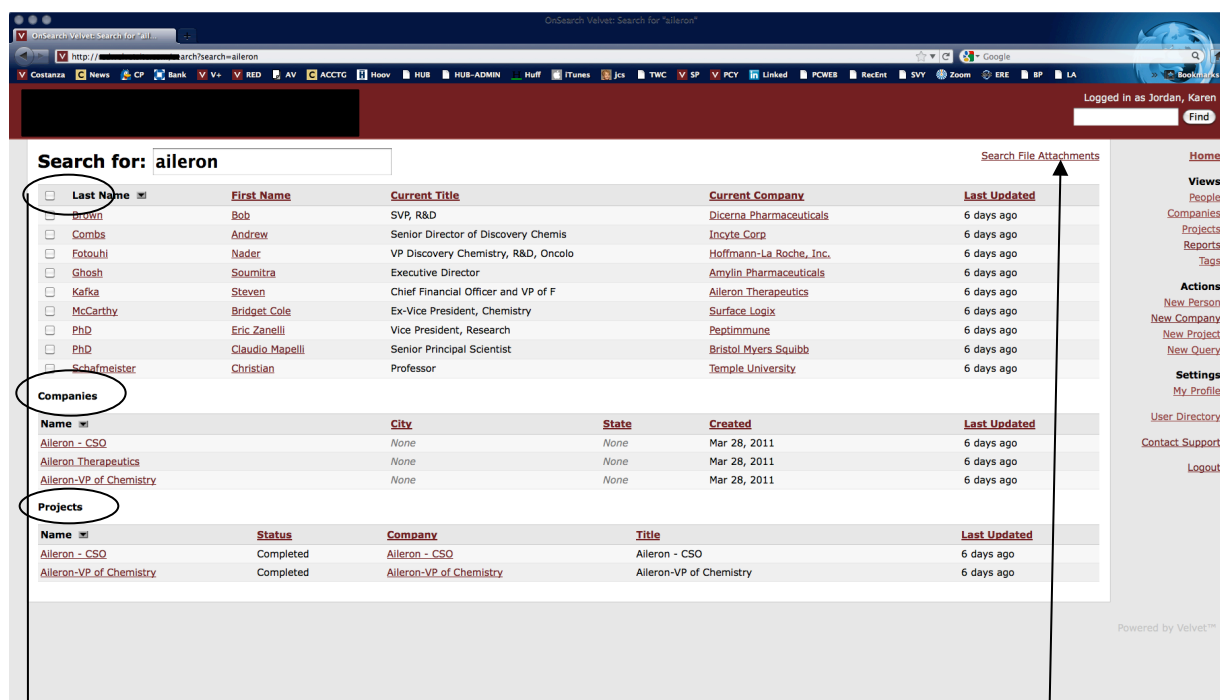
BASIC SEARCHING

Use the FIND box in the upper right corner of your screen to search Velvet.



Type any part of a name or keyword in the FIND box and click the find button.

Results are displayed as follows:



Search for: aileron

[Search File Attachments](#)

People

<input type="checkbox"/> Last Name	First Name	Current Title	Current Company	Last Updated
Brown	Bob	SVP, R&D	Dicerna Pharmaceuticals	6 days ago
Combs	Andrew	Senior Director of Discovery Chemis	Incyte Corp	6 days ago
Fotouhi	Nader	VP Discovery Chemistry, R&D, Oncolo	Hoffmann-La Roche, Inc.	6 days ago
Ghosh	Soumitra	Executive Director	Amylin Pharmaceuticals	6 days ago
Kafka	Steven	Chief Financial Officer and VP of F	Aileron Therapeutics	6 days ago
McCarthy	Bridget Cole	Ex-Vice President, Chemistry	Surface Logix	6 days ago
PhD	Eric Zanelli	Vice President, Research	Peptimmune	6 days ago
PhD	Claudio Mapelli	Senior Principal Scientist	Bristol Myers Squibb	6 days ago
Schafmeister	Christian	Professor	Temple University	6 days ago

Companies

Name	City	State	Created	Last Updated
Aileron-CSO	None	None	Mar 28, 2011	6 days ago
Aileron-Therapeutics	None	None	Mar 28, 2011	6 days ago
Aileron-VP of Chemistry	None	None	Mar 28, 2011	6 days ago

Projects

Name	Status	Company	Title	Last Updated
Aileron-CSO	Completed	Aileron-CSO	Aileron-CSO	6 days ago
Aileron-VP of Chemistry	Completed	Aileron-VP of Chemistry	Aileron-VP of Chemistry	6 days ago

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Results are grouped according to record type.

Search Attachments: To text-search attachments, click the link in the upper right. It will add results in a new section at the bottom.

To navigate to a record, click on the red link for each.

PERSON RECORD – VIEW EXISTING RECORD

After clicking on a person record link (name) you will be taken to the person record.

[illegible]

- 1 Name, Title, Company
- 2 Contact Information
- 3 Admin Contact Info.

- 4 Call Routing/Custody
- 5 Project Association
- 6 Job Titles

- 7 Education Information
- 8 Memos/Comments
- 9 Document Attachments
- 10 Vcard/Print:Profile/Email Link

PERSON RECORD – VIEW/CHANGE CONTACT INFORMATION

Detailed descriptions of each section are below.

Ms. Isabella Rosario *Person* ← TYPE OF RECORD
 VP, HR
[ZZZ Chemical Company](#) ← ACTIVE LINK TO COMPANY RECORD
 Created by Stein, Bob on February 24, 2007, last updated 56 days ago
 ↑ WHO CREATED, WHEN

Contact information - View

Direct Work Phone <i>None</i>	Work Phone (222) 345-2122 x120	Mobile Phone <i>None</i>	Home Phone <i>None</i>	Fax <i>None</i>
Work Address ZZZ Chemical Company 123 HHH Street Hartford, CT 11112		Home Address <i>None</i>	Work E-Mail <i>None</i> Personal E-Mail <i>None</i>	

IF LEFT BLANK IN PERSON RECORD, Velvet POPULATES USING THEIR CURRENT COMPANY INFORMATION, ASSUMING COMPANY RECORD IS COMPLETE.

Editing Name or Contact Information

(to edit contact information, click [Edit](#) in upper right corner)

[Edit](#)
[Download vCard](#)
[E-Mail Researcher](#) | [E-Mail Assistant](#)

Editing Isabella Rosario

Salutation First Name Middle Name Last Name Suffix

Direct Work Phone Work Phone Ext. Mobile Phone Home Phone Fax
 ☒

Selected phone number becomes default

Work Address Home Address

Leave address blank to use current company's

Work E-Mail Personal E-Mail
☒ ☐

Selected e-mail address becomes default

INDICATES PREFERRED CONTACT #

NO FORMAT REQUIRED

[Delete Person](#) | [Cancel](#)


ONLY AUTHORIZED USERS
 HAVE THE ABILITY TO
 DELETE PEOPLE RECORDS.

PERSON RECORD – VIEW/CHANGE CALL/CUSTODY INFORMATION

Detailed descriptions of each section are below.

Call Assignments / Custody

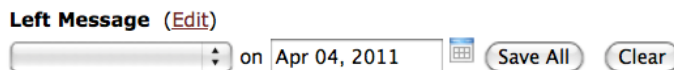
This section displays information relating to current “custody” of an individual. A user listed in any of these fields likely has current rights over this person and should be contacted before calling the person.



TO ASSIGN YOURSELF AS CALLER, CLICK **EDIT**. THEN SELECT YOURSELF FROM THE LIST, OR SELECT ANOTHER USER TO ASSIGN THEM CALLER RIGHTS. (THIS WILL ADD THIS PERSON RECORD AND CALL ASSIGNMENT TO THE USER’S HOME PAGE) CLICK SAVE.



TO CLEAR A NAME WHEN MAKING THE CALL, CLICK **CLEAR**.

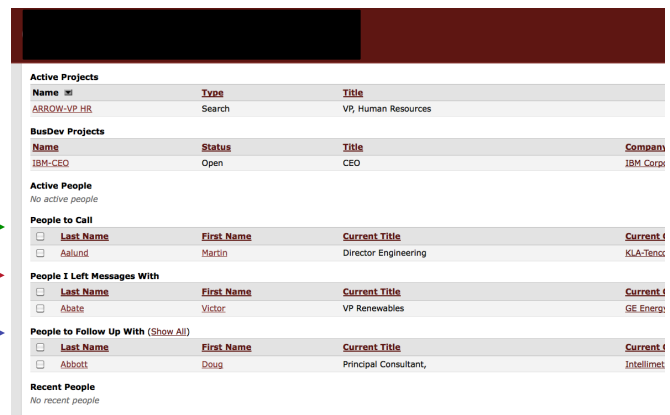


TO INDICATE YOU’VE LEFT A MESSAGE, CLICK EDIT NEXT TO THE LEFT MESSAGE FIELD AND SELECT YOUR NAME FROM THE DROP-DOWN LIST. DATE DEFAULTS TO “TODAY”, BUT CAN BE CHANGED. (THIS WILL MOVE A PERSON FROM YOUR HOME PAGE “PEOPLE TO CALL” SECTION TO THE “PEOPLE I LEFT MESSAGES WITH” SECTION.) CLICK SAVE.



TO SET A FOLLOW UP REMINDER, EDIT THE FOLLOW UP FIELD AND SELECT YOURSELF OR ANOTHER USER. THE DATE DEFAULTS TO 30-DAYS FROM TODAY, BUT CAN BE CHANGED. (THIS WILL APPEAR ON YOUR HOME PAGE AS A REMINDER WHEN THE FOLLOW UP DATE IS WITHIN 14 DAYS.) CLICK SAVE.

HOME PAGE



Name	Type	Title
ARROW-VP HR	Search	VP, Human Resources

Name	Status	Title	Company
IBM-CEO	Open	CEO	IBM Corp

No active people

<input type="checkbox"/> Last Name	First Name	Current Title	Current I
<input type="checkbox"/> Aallund	Martin	Director Engineering	KLA-Tencor

People I Left Messages With

<input type="checkbox"/> Last Name	First Name	Current Title	Current I
<input type="checkbox"/> Abate	Victor	VP Renewables	GE Energy

People to Follow Up With (Show All)

<input type="checkbox"/> Last Name	First Name	Current Title	Current I
<input type="checkbox"/> Abbott	Doug	Principal Consultant,	Intellinet

Recent People

No recent people

PERSON RECORD – DELEGATE TASK

While viewing a person record (or company record) a user can ask for more information or assign a task to another individual in the firm.

To request information or assign a task, click the appropriate link to the upper right: [Email Researcher](#) or [Email Assistant](#).

Gregory Aasen *Person*
SVP Strategy, Networking
PMC-Sierra
 Created on Aug 16, 2006, last updated about 3 hours ago

Work Phone (408) 239-8000
Mobile Phone None
Mobile Phone 2 None
Home Phone None
Other Phone None

Work Address None
Home Address None

Work E-Mail None
Personal E-Mail greg_aasen@pmc-sierra.com
Personal E-Mail 2 None

Assistant Name None
Assistant Work Phone None
Assistant Mobile Phone None
Assistant E-Mail None

Kids/Relocation None

Biography
 *** SHAWN (Shawn Ogelsbee) *** October 27, 2006 at 4:24pm Greg Aasen Chief Strategy Officer Greg Aasen is the chief strategy officer at PMC-Sierra. Previously he was vice president and general manager of the communications products division, and prior to that, chief operating officer and chief technology officer of the company. Mr. Aasen is a founding member of the PMC-Sierra and brings more than twenty years of experience to the semiconductor industry. In 1986 he joined MPR Teltech and later established the Pacific Microelectronic Centre (PMC), MPR Teltech's first business division. In 1992, Mr. Aasen's vision was realized when PMC-Sierra spun-out from MPR Teltech through an investment from Sierra Semiconductor. Mr. Aasen is a member of the Board of Directors for Conveda Corporation and Sierra Wireless.

Call List (Edit) None
Left Message (Edit) None

Follow Up (Edit) None
Next Steps (Edit) Client Mtgs on Apr 04, 2011

Tags (Edit) None

Actions
[Download vCard](#) | [Report \(Download\)](#) | [Edit](#)
[E-Mail Researcher](#) | [E-Mail Assistant](#)

Settings
[My Profile](#)
[Manage Users](#)
[Group Settings](#)
[Contact Support](#)
[Logout](#)

In doing so, your email client (MS Outlook, for example) will open, pre-fill with your designated admin or research email address and embed a link in the email referring to this record. A user can add a note, task, or question and click send.

The recipient has a direct link in the email and can click on it to view the record your are referring to. Users are encourage to perform these tasks immediately, but can manage them in Outlook Tasks.

To manage in MS Outlook Tasks, the user should drag the email into their tasks list. Set a due date or manage the list via tasks.

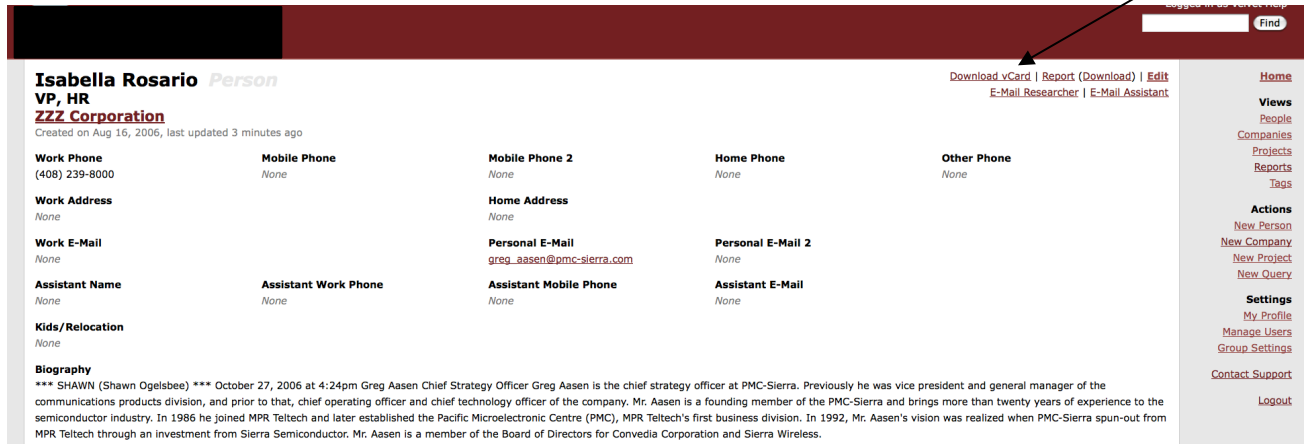
Isabella Rosario
 URL: <http://orion.superblock.net/people/gregory-aasen>

Robert Stein [rstein@prospectcity.com]
 To: rstein@prospectcity.com

Isabella Rosario
 URL: <http://orion.superblock.net/people/gregory-aasen>

PERSON RECORD – EXPORT TO MS OUTLOOK

While viewing a person record a user can export that record to MS Outlook. To do so, click [Download vCard](#) in the upper right corner.



Isabella Rosario *Person*
VP, HR
ZZZ Corporation
 Created on Aug 16, 2006, last updated 3 minutes ago

Work Phone
 (408) 239-8000

Mobile Phone
 None

Mobile Phone 2
 None

Home Phone
 None

Other Phone
 None

Work Address
 None

Home Address
 None

Work E-Mail
 None

Personal E-Mail
greg_aasen@pmc-sierra.com

Personal E-Mail 2
 None

Assistant Name
 None

Assistant Work Phone
 None

Assistant Mobile Phone
 None

Assistant E-Mail
 None

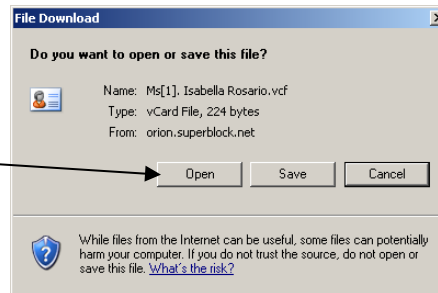
Kids/Relocation
 None

Biography
 *** SHAWN (Shawn Ogelsbee) *** October 27, 2006 at 4:24pm Greg Aasen Chief Strategy Officer Greg Aasen is the chief strategy officer at PMC-Sierra. Previously he was vice president and general manager of the communications products division, and prior to that, chief operating officer and chief technology officer of the company. Mr. Aasen is a founding member of the PMC-Sierra and brings more than twenty years of experience to the semiconductor industry. In 1986 he joined MPR Teltech and later established the Pacific Microelectronic Centre (PMC), MPR Teltech's first business division. In 1992, Mr. Aasen's vision was realized when PMC-Sierra spun-out from MPR Teltech through an investment from Sierra Semiconductor. Mr. Aasen is a member of the Board of Directors for Conveda Corporation and Sierra Wireless.

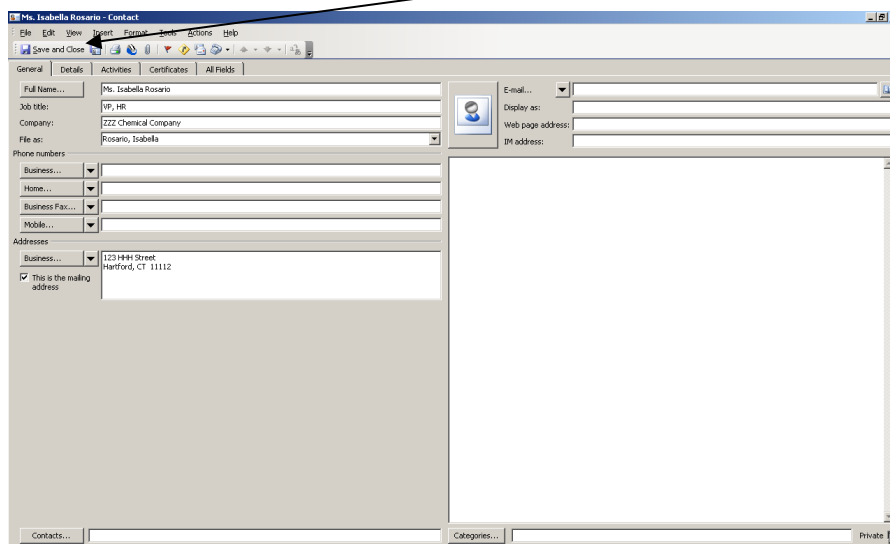
[Download vCard](#) | [Report \(Download\)](#) | [Edit](#)
 E-Mail: [Researcher](#) | [E-Mail Assistant](#)

Home
[Views](#)
[People](#)
[Companies](#)
[Projects](#)
[Reports](#)
[Tags](#)
Actions
[New Person](#)
[New Company](#)
[New Project](#)
[New Query](#)
Settings
[My Profile](#)
[Manage Users](#)
[Group Settings](#)
[Contact Support](#)
[Logout](#)

When the popup box appears, select OPEN.



The record will appear in a MS Outlook contact record. Simply click [Save and Close](#) to add it to your MS Outlook contacts.



Ms. Isabella Rosario - Contact

File Edit View Format Window Help

[Save and Close](#) [New](#) [Print](#) [Forward](#) [Back](#) [Close](#) [Help](#)

General Details Activities Certificates All Fields

Full Name: Ms. Isabella Rosario

Job title: VP, HR

Company: ZZZ Chemical Company

File as: Rosario, Isabella

Phone numbers:

Business:

Home:

Business Fax:

Mobile:

Addresses:

Business: 123 Main Street
 Hartford, CT 01112

☒ This is the mailing address

Categories:

Private ☐

PERSON RECORD – VIEW/CHANGE PROJECT ASSOCIATION

Detailed descriptions of each section are below.

Project Association

Assigning a person to a project is done within the person record. A person can be added as a Source, Research, Candidate, Interview-Client, Placed Candidate or as Ex-Prospect.

Each person should have one project association per search, and their status should be moved up or down in the pipeline. To move a person up in the pipeline, or to change their status (research to candidate, for example), a user should edit the existing project association rather than creating a new one.

BOLD INDICATES ACTIVE PROJECT

LINK TO CHANGE STATUS

Projects	Title	Status	When	
Project				
Santur-CEO	CEO	Research	2011-04-01	Edit
ARROW-VP HR	VP, Human Resources	Candidate	2011-04-05	Edit

[Add To Project](#)

TO CHANGE AN EXISTING STATUS, CLICK **EDIT**.

Editing status of ARROW-VP HR for Isabella Rosario

SELECT NEW STATUS AND CLICK SAVE BUTTON.

NEW!
When users change the status of a person, such as moving them from prospect to candidate, Velvet willnow automatically create a memo reflecting the change, noting who made the change and when it occurred.

TO ADD A PROJECT ASSOCIATION, CLICK **ADD TO PROJECT**.

SELECT AN ACTIVE BUSDEV OR SEARCH PROJECT AND A STATUS.

CLICK ADD.

[Add To Project](#)

Project:

Status:

Date:

Memo:

Optionally, you may add a date when the status was added/changed and you can add a comment.

It is recommended the comment relate to the status of this person in this search project.

NOTE: CONTACT OR CAREER-RELATED COMMENTS DO NOT GO IN THIS SECTION. COMMENTS GO IN THE MEMOS SECTION AND CAN BE TIED TO A SEARCH PROJECT THERE. THE COMMENT SECTION ILLUSTRATED ABOVE IS DESIGNED TO GIVE THE USER QUICK ACCESS TO NOTES RELATING TO THE STATUS ON THIS PARTICULAR SEARCH PROJECT. FOR EXAMPLE: “On hold while client schedules mtg.”

PERSON RECORD – VIEW/CHANGE JOB INFORMATION

Detailed descriptions of each section are below.

Job Title(s)

Velvet stores unlimited jobs within the person record. Each job is listed in reverse chronological order, with the “current” job listed on top. The current job is indicated by an open/empty “to” date.

Titles		Company	Started	Ended	
Title					
VP, HR (GM (P&L))		ZZZ Corporation	Unknown	Current	Edit
Base: None Bonus: None Other: None					

[Add Title](#)

Company: (Lookup)

Title: Function: (Lookup) Board Member? ☐

Division:

Reports To:

Start Date:

End Date: Leave blank for current title

Base Comp: Bonus Comp:

Other Comp:

Comments:

[Add](#)

View existing or Edit existing. All red underlined fields are active links.

NEW OPTION!

Clients can provide links to lookup proper names, such as Hoovers, etc.

Add New Job

To add a new job, click the [Add Title](#) link. This will display the fields for entering a new job.

Company can be selected while typing. If the correct company does not display as you type, continue typing the company name in whole and the new company will be added when the record is saved.

Titles are required. If the title is unknown, enter unknown.

Start date is not required, but useful when entering a number of jobs.

End date is to be left blank if the job is current.

Base compensation and bonus compensation are text fields. Enter text or numbers in any format.

Other compensation is a text-based field. Users can enter any additional information here (car, club, etc.)

Comments are associated with this job only (responsibilities, for example)

Function tags may be entered for each role. The user’s frequently used function codes will appear below the field. To add these a user simply needs to click on them. If the user needs to lookup additional codes, click [lookup](#).

PERSON RECORD – VIEW/CHANGE JOB INFORMATION

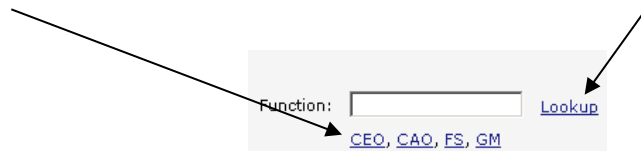
Detailed descriptions of each section are below.

Function Tags

Function tags are used to tag skills and group individuals by skills in order to find them later during a complex query.

Adding a Function Code

When entering or editing a job title, the user can add function codes by either clicking a commonly used code from their user list or by looking up a code from the company's master list of function codes.



Each time a user selects a code from the master list, it appears under their “commonly used” codes, which can be easily accessed in the future. If this list gets too large, the user can edit it within their user profile located via the “[My Profile](#)” link on the right-side menu.

Master Function Code List

The master list can be accessed by clicking on [Lookup](#).

In the popup box the user can expand or contract the list according to subject.

To add a code simply select it from the list. Codes are simplified so users can select multiple codes to form a skill set.

Close the window when complete.

Click [Add](#) to save the person record.

Edit Function Tag Short-List

To edit your commonly used code list located under the function code field, click on [My Profile](#) from the right-side menu.

Click Edit while viewing your user profile.

Scroll down to see your [Common Function Tags](#) list. Edit as appropriate.

Only fill out these fields if you

New Password:

New Password (confirm):

Office:

Practice:

Title:

IM:

Direct Phone:

Common Function Tags:

Separate tags by commas

PERSON RECORD – VIEW/CHANGE EDUCATION

Users may optionally enter and manage education criteria within a person record. To do so, scroll down to the education section and click [Add Education](#).

Degree	School	Major	Grad Year	Verified	
Bachelor honors	U. of Iowa	Engineering	2007	Yes	Edit

[Add Education](#)

Degree: School:
 Major: State: Graduation Year:
 Verified: ☐ Yes, by:
 Comments:

EDIT EXISTING ENTRY

Select appropriate fields and enter information for education. School names are free-text entry. There is no minimum requirement.

PERSON RECORD – VIEW/CHANGE MEMOS

Each person record may contain an unlimited number of memos, or comments. Users may edit existing memos or add new ones. It is recommended users edit existing memos whenever possible to minimize the number of memos per record.

Edit a Memo

To edit an existing memo, the user should click on [Edit](#). The user should then add text at the end of the field.

Memos
Memo
 Added on 2007-04-25
 Call Out from JOSH Result: VM

[Add A Memo](#)

Project: Type:
 Referred:
 Referred:
 Memo:

[Edit](#)

Enter a New Memo

Users can add a new memo by clicking [Add Memo](#). The user can select a specific feedback type and enter text in the memo box. If the memo specifically addresses a search project, the user can select the project from the drop-down list. If the comments are general (referring to career information, for example), do not select a project.

Referrals

Often when on a call a person may refer another individual for the project. The user can record this by typing a name in the referral field. Existing names will appear (to select) or you can continue typing to add a new person to the database. **New!** Both person records will also display a link connecting the two forever.

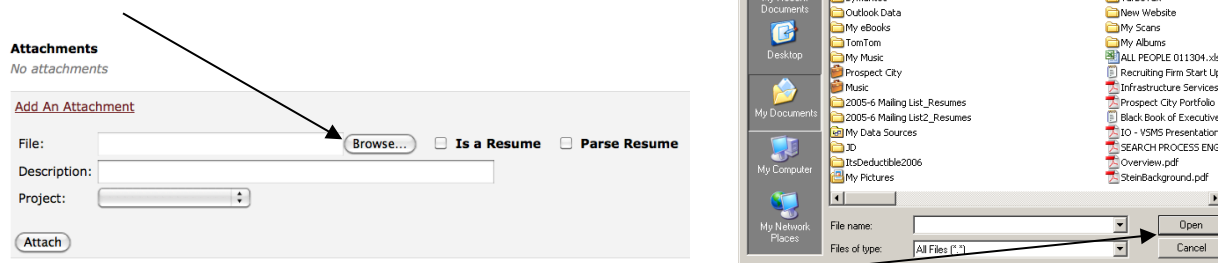
PERSON RECORD – VIEW/CHANGE ATTACHMENTS

Users can modify uploaded attachment records. Examples include changing description, project, etc. However, users are not able to modify the attachments themselves. Users must first download the attachment to their computer, make changes, and re-upload the new modified document.

Upload a new Document

Click [Add an Attachment](#).

Click browse to locate the document on your computer.



After selecting the document from your computer, click Open.

On Velvet's upload screen, check the "Is a Resume" box if the document is a resume. If not, enter a description in the description field.

NOTE: If the document specifically addresses a project (such as a candidate write-up), select the project from the drop down list.

PERSON RECORD – PARSING A RESUME

See next page for parsing overview.

ATTACHMENT GUIDELINES

Guidelines for uploading attachments are below.

People Record documents should be limited to resumes, write-ups, references, articles, and other documents specific to the person.

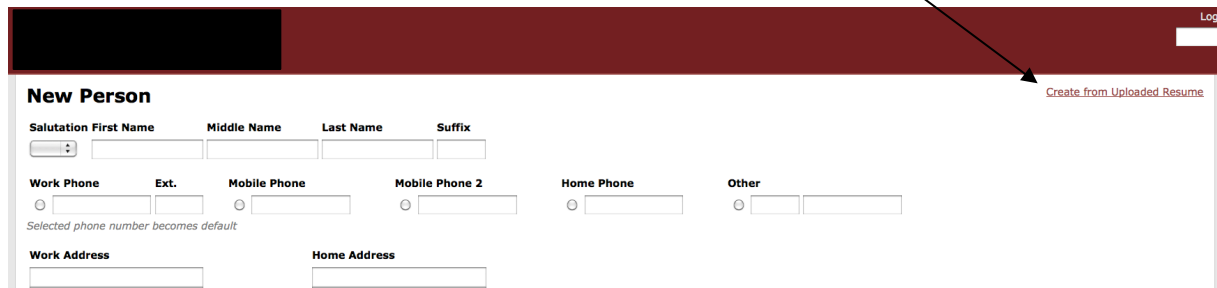
Company Record documents should be limited to the company itself, such as an organization chart. We recommend using outside resources such as Hoovers to maintain company information (rather than uploading it)

Project Record documents should be limited to information associated with the project, such as contracts, invoices, proposals, presentations, etc. Candidate write-ups belong in people records with the associated project indicated.

PERSON RECORD – PARSING A RESUME

You may enter a new person into the database via resume parsing, or you may update an existing record via resume parsing. WARNING: Resume parsing will overwrite existing information in the database so it is suggested that users pay close attention to the process when applying to existing records.

You may parse a resume as the initial process for entering a person into the database. On the right side menu, click [New Person](#). In the upper right corner, click [Create from Uploaded Resume](#).



Browse and select the resume from your computer. (If you received it in an email it must first be saved to your computer)

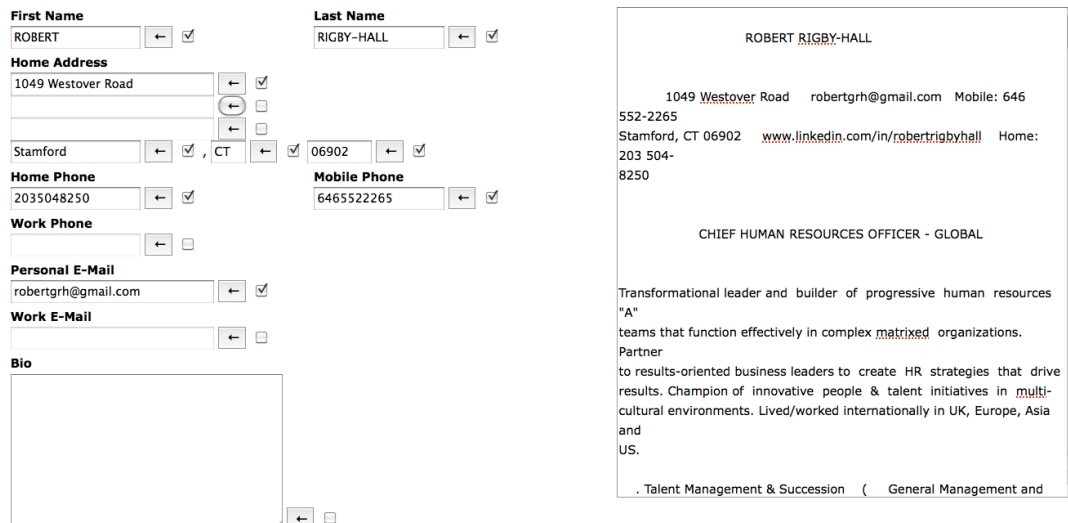


After you have selected the resume, click the parse button.

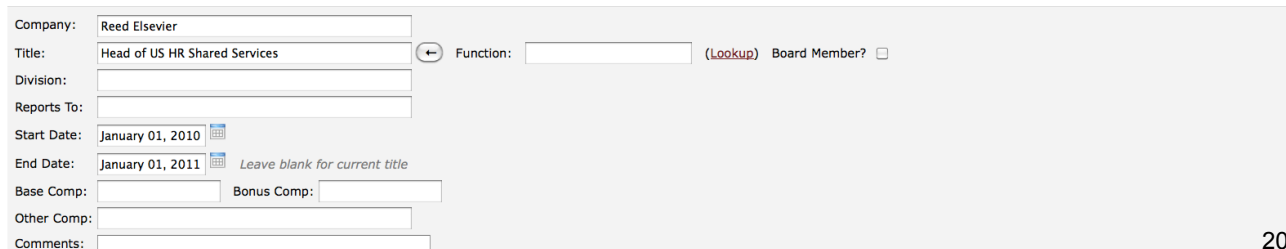
New Person (Parsed Resume)

The uploaded resume has been analyzed and parsed with the following data. To accept the parsed value for a field, check the box next to it. Otherwise, if the parsed data is not accurate or you do not wish to store it, leave the box unchecked and the previous value (if any) will be kept.

To manually move data from the resume into a particular field, highlight the text in the resume and then click the [---] button next to that field.



Titles

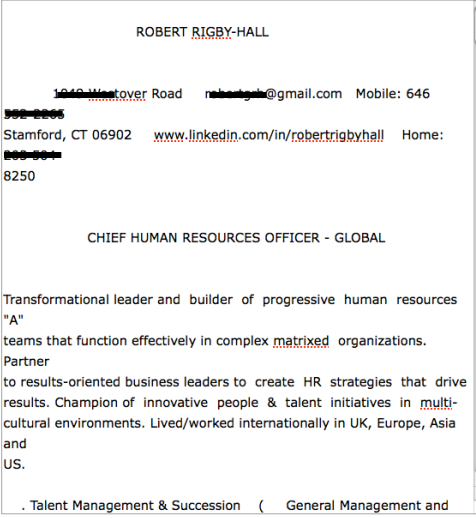


PERSON RECORD – PARSING A RESUME

New Person (Parsed Resume)

The uploaded resume has been analyzed and parsed with the following data. To accept the parsed value for a field, check the box next to it. Otherwise, if the parsed data is not accurate or you do not wish to store it, leave the box unchecked and the previous value (if any) will be kept.

To manually move data from the resume into a particular field, highlight the text in the resume and then click the [↔] button next to that field.

First Name ROBERT <input type="checkbox"/>	Last Name RIGBY-HALL <input type="checkbox"/>	
Home Address 1045 Waver Road <input type="checkbox"/> Stamford, CT 06902 <input type="checkbox"/>		
Home Phone 203-442-1500 <input type="checkbox"/>	Mobile Phone 949-632-6565 <input type="checkbox"/>	
Work Phone <input type="checkbox"/>		
Personal E-Mail robert.rigby@gmail.com <input type="checkbox"/>		
Work E-Mail <input type="checkbox"/>		
Bio <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		

Titles

Company:	Reed Elsevier		
Title:	Head of US HR Shared Services	Function:	<input type="text"/> (Lookup) Board Member? <input type="checkbox"/>
Division:	<input type="text"/>		
Reports To:	<input type="text"/>		
Start Date:	January 01, 2010		
End Date:	January 01, 2011	Leave blank for current title	
Base Comp:	<input type="text"/>	Bonus Comp:	<input type="text"/>
Other Comp:	<input type="text"/>		
Comments:	<input type="text"/>		

Resume parsing is not a perfect science. To assist you with any necessary corrections we have created an easy way to make corrections.

- We have displayed a copy of the resume in text form in the window to the right for comparison.
- In addition to manually typing corrections, we offer a point-and-click alternative:
 - 1) On the resume, highlight the correct text, such as job title.
 - 2) On the left, select the appropriate field where the highlighted text belongs.
 - 3) Click the arrow to the right of the field and it will copy the text over to Velvet automatically.

Scroll down to add or delete additional job titles and education.

NOTE: Be sure the check box next to the field is checked in order to import that field's information. Unchecked fields will not transfer.

PERSON RECORD – NEW PERSON

Adding a New Person

Velvet is designed to make adding a new person easy.

Click [New Person](#) from the right-side menu.

Users must firsts complete the basic name and contact information, then click CREATE.

New Person

Only a first and last name is required to continue.

No special formatting required

Selected phone number becomes default

Leave address blank to use current company's

Selected e-mail address becomes default

You may choose to enter job title information here or you can save the record and enter in the next step.

Create

[Back](#)

Salutation First Name Middle Name Last Name Suffix

Work Phone Ext. Mobile Phone Mobile Phone 2 Home Phone Other

Work Address Home Address

Work E-Mail Personal E-Mail Personal E-Mail 2

Assistant Name Assistant E-Mail Assistant Work Phone Assistant Mobile Phone

Kids/Relocation:

Biography

Current Title

Company: Title: Division: Reports To: Start Date: End Date: Base Comp: Bonus Comp: Other Comp: Comments:

Function: (Lookup) Board Member? ☐

Leave blank for current title

PERSON RECORD – ADD/SET CALL/CUSTODY INFORMATION

Detailed descriptions of each section are below.

Call Assignments / Custody

This section displays information relating to current “custody” of an individual. A user listed in any of these fields likely has current rights over this person and should be contacted before calling the person.

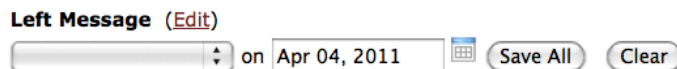


TO ASSIGN YOURSELF AS CALLER, CLICK **EDIT**. THEN SELECT YOURSELF FROM THE LIST, OR SELECT ANOTHER USER TO ASSIGN THEM CALLER RIGHTS. (THIS WILL ADD THIS PERSON RECORD AND CALL ASSIGNMENT TO THE USER’S HOME PAGE) CLICK SAVE.



TO CLEAR A NAME WHEN MAKING THE CALL, CLICK **CLEAR**.

TO INDICATE YOU’VE LEFT A MESSAGE, CLICK EDIT NEXT TO THE LEFT MESSAGE FIELD AND SELECT YOUR NAME FROM THE DROP-DOWN LIST. DATE DEFAULTS TO “TODAY”, BUT CAN BE CHANGED. (THIS WILL MOVE A PERSON FROM YOUR HOME PAGE “PEOPLE TO CALL” SECTION TO THE “PEOPLE I LEFT MESSAGES WITH” SECTION.) CLICK SAVE.




TO SET A FOLLOW UP REMINDER, EDIT THE FOLLOW UP FIELD AND SELECT YOURSELF OR ANOTHER USER. THE DATE DEFAULTS TO 30-DAYS FROM TODAY, BUT CAN BE CHANGED. (THIS WILL APPEAR ON YOUR HOME PAGE AS A REMINDER WHEN THE FOLLOW UP DATE IS WITHIN 14 DAYS.) CLICK SAVE.

Active Projects

Name	Type	Title
ARROW-VP_HR	Search	VP, Human Resources

BusDev Projects

Name	Status	Title	Company
IBM-CEO	Open	CEO	IBM Corp

Active People

No active people

People to Call

<input type="checkbox"/> Last Name	First Name	Current Title	Current Title
<input type="checkbox"/> Allund	Martin	Director Engineering	KLA-Tencor

People I Left Messages With

<input type="checkbox"/> Last Name	First Name	Current Title	Current Title
<input type="checkbox"/> Abate	Victor	VP Renewables	GE Energy

People to Follow Up With (Show All)

<input type="checkbox"/> Last Name	First Name	Current Title	Current Title
<input type="checkbox"/> Abbott	Doug	Principal Consultant,	Intellimet

Recent People

No recent people

PERSON RECORD – DELEGATE TASK

While viewing a person record (or company record) a user can ask for more information or assign a task to another individual in the firm.

To request information or assign a task, click the appropriate link to the upper right: [Email Researcher](#) or [Email Assistant](#).

Gregory Aasen *Person*
SVP Strategy, Networking
PMC-Sierra
 Created on Aug 16, 2006, last updated about 3 hours ago

Work Phone (408) 239-8000
Mobile Phone None
Mobile Phone 2 None
Home Phone None
Other Phone None

Work Address None
Home Address None

Work E-Mail None
Personal E-Mail greg_aasen@pmc-sierra.com
Personal E-Mail 2 None

Assistant Name None
Assistant Work Phone None
Assistant Mobile Phone None
Assistant E-Mail None

Kids/Relocation None

Biography
 *** SHAWN (Shawn Ogelsbee) *** October 27, 2006 at 4:24pm Greg Aasen Chief Strategy Officer Greg Aasen is the chief strategy officer at PMC-Sierra. Previously he was vice president and general manager of the communications products division, and prior to that, chief operating officer and chief technology officer of the company. Mr. Aasen is a founding member of the PMC-Sierra and brings more than twenty years of experience to the semiconductor industry. In 1986 he joined MPR Teltech and later established the Pacific Microelectronic Centre (PMC), MPR Teltech's first business division. In 1992, Mr. Aasen's vision was realized when PMC-Sierra spun-out from MPR Teltech through an investment from Sierra Semiconductor. Mr. Aasen is a member of the Board of Directors for Conveda Corporation and Sierra Wireless.

Call List (Edit) None
Left Message (Edit) None

Follow Up (Edit) None
Next Steps (Edit) Client Mtgs on Apr 04, 2011

Tags (Edit) None

Actions
[Download vCard](#) | [Report \(Download\)](#) | [Edit](#)
[E-Mail Researcher](#) | [E-Mail Assistant](#)

Settings
[My Profile](#)
[Manage Users](#)
[Group Settings](#)
[Contact Support](#)
[Logout](#)

In doing so, your email client (MS Outlook, for example) will open, pre-fill with your designated admin or research email address and embed a link in the email referring to this record. A user can add a note, task, or question and click send.

The recipient has a direct link in the email and can click on it to view the record your are referring to. Users are encourage to perform these tasks immediately, but can manage them in Outlook Tasks.

To manage in MS Outlook Tasks, the user should drag the email into their tasks list. Set a due date or manage the list via tasks.

PERSON RECORD – ADD PROJECT ASSOCIATION

Detailed descriptions of each section are below.

Project Association

Assigning a person to a project is done within the person record. A person can be added as a Source, Research, Candidate, Interview-Client, Placed Candidate or as Ex-Prospect.

Each person should have one project association per search, and their status should be moved up or down in the pipeline. To move a person up in the pipeline, or to change their status (research to candidate, for example), a user should edit the existing project association rather than creating a new one.

BOLD INDICATES ACTIVE PROJECT

LINK TO CHANGE STATUS

Projects	Title	Status	When	
Santur-CEO	CEO	Research	2011-04-01	Edit
ARROW-VP HR	VP, Human Resources	Candidate	2011-04-05	Edit

[Add To Project](#)

TO CHANGE AN EXISTING STATUS, CLICK **EDIT**.

Editing status of ARROW-VP HR for Isabella Rosario

SELECT NEW STATUS AND CLICK SAVE BUTTON.

Status:

Date:

Memo:

[Delete Project Association](#)

Optionally, you may add a date when the status was added/changed and you can add a comment.

TO ADD A PROJECT ASSOCIATION, CLICK **ADD TO PROJECT**

SELECT AN ACTIVE BUSDEV OR SEARCH PROJECT AND A STATUS.

[Add To Project](#)

Project:

Status:

Date:

Memo:

It is recommended the comment relate to the status of this person in this search project.

CLICK ADD.

NOTE: CONTACT OR CAREER-RELATED COMMENTS DO NOT GO IN THIS SECTION. COMMENTS GO IN THE MEMOS SECTION AND CAN BE TIED TO A SEARCH PROJECT THERE. THE COMMENT SECTION ILLUSTRATED ABOVE IS DESIGNED TO GIVE THE USER QUICK ACCESS TO NOTES RELATING TO THE STATUS ON THIS PARTICULAR SEARCH PROJECT. FOR EXAMPLE: “On hold while client schedules mtg.”

PERSON RECORD – ADD JOB INFORMATION

Detailed descriptions of each section are below.

Job Title(s)

Velvet stores unlimited jobs within the person record. Each job is listed in reverse chronological order, with the “current” job listed on top. The current job is indicated by an open/empty “to” date.

Titles	Company	Started	Ended	
Title				
VP, HR (GM (P&L))	ZZZ Corporation	Unknown	Current	Edit
Base: None Bonus: None Other: None				

[Add Title](#)

Company: (Lookup)

Title: Function: (Lookup) Board Member? ☐

Division:

Reports To:

Start Date:

End Date: Leave blank for current title

Base Comp: Bonus Comp:

Other Comp:

Comments:

[Add](#)

View existing or Edit existing. All red underlined fields are active links.

NEW OPTION!
Clients can provide links to lookup proper names, such as Hoovers, etc.

Add New Job

To add a new job, click the [Add Title](#) link. This will display the fields for entering a new job.

Company can be selected while typing. If the correct company does not display as you type, continue typing the company name in whole and the new company will be added when the record is saved.

Titles are required. If the title is unknown, enter unknown.

Start date is not required, but useful when entering a number of jobs.

End date is to be left blank if the job is current.

Base compensation and bonus compensation are text fields. Enter text or numbers in any format.

Other compensation is a text-based field. Users can enter any additional information here (car, club, etc.)

Comments are associated with this job only (responsibilities, for example)

Function tags may be entered for each role. The user’s frequently used function codes will appear below the field. To add these a user simply needs to click on them. If the user needs to lookup additional codes, click [lookup](#).

PERSON RECORD – ADD JOB INFORMATION

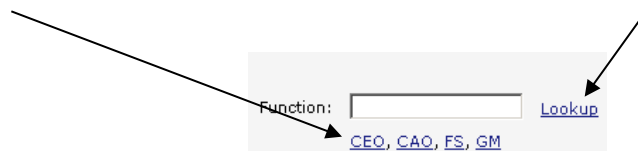
Detailed descriptions of each section are below.

Function Tags

Function tags are used to tag skills and group individuals by skills in order to find them later during a complex query.

Adding a Function Code

When entering or editing a job title, the user can add function codes by either clicking a commonly used code from their user list or by looking up a code from the company's master list of function codes.



Each time a user selects a code from the master list, it appears under their “commonly used” codes, which can be easily accessed in the future. If this list gets too large, the user can edit it within their user profile located via the “[My Profile](#)” link on the right-side menu.

Master Function Code List

The master list can be accessed by clicking on [Lookup](#).

In the popup box the user can expand or contract the list according to subject.

To add a code simply select it from the list. Codes are simplified so users can select multiple codes to form a skill set.

Close the window when complete.

Click [Add](#) to save the person record.

Edit Function Tag Short-List

To edit your commonly used code list located under the function code field, click on [My Profile](#) from the right-side menu.

Click Edit while viewing your user profile.

Scroll down to see your [Common Function Tags](#) list. Edit as appropriate.

New Password:

New Password (confirm):

Office:

Practice:

Title:

IM:

Direct Phone:

Common Function Tags:

Only fill out these fields if you.

Separate tags by commas

TIP:

Function Tags/Codes are associated with jobs and job descriptions. They are not used to identify industry experience.

Industry codes are located in company records. When a person has a job history with a company the industry codes there will connect the person to the industry.

PERSON RECORD – ADD EDUCATION

Users may optionally enter and manage education criteria within a person record. To do so, scroll down to the education section and click [Add Education](#).

Degree	School	Major	Grad Year	Verified	
Bachelor honors	U. of Iowa	Engineering	2007	Yes	Edit

[Add Education](#)

Degree: School: (Lookup)

Major: State: Graduation Year:

Verified: ☐ Yes, by:

Comments:

EDIT EXISTING ENTRY

NEW OPTION!
 Clients can provide links to lookup proper names, such as ed.gov, etc.

Select appropriate fields and enter information for education. School names are free-text entry. There is no minimum requirement.

PERSON RECORD – ADD MEMOS

Each person record may contain an unlimited number of memos, or comments. Users may edit existing memos or add new ones. It is recommended users edit existing memos whenever possible to minimize the number of memos per record.

Edit a Memo

To edit an existing memo, the user should click on [Edit](#). The user should then add text at the end of the field.

Memos

Memo

Added on 2007-04-25
 Call Out from JOSH Result: VM

[Edit](#)

[Add A Memo](#)

Project: Type:

Referred:

Referred:

Memo:

Enter a New Memo

Users can add a new memo by clicking [Add Memo](#). The user can select a specific feedback type and enter text in the memo box. If the memo specifically addresses a search project, the user can select the project from the drop-down list. If the comments are general (referring to career information, for example), do not select a project.

Referrals

Often when on a call a person may refer another individual for the project. The user can record this by typing a name in the referral field. Existing names will appear (to select) or you can continue typing to add a new person to the database.

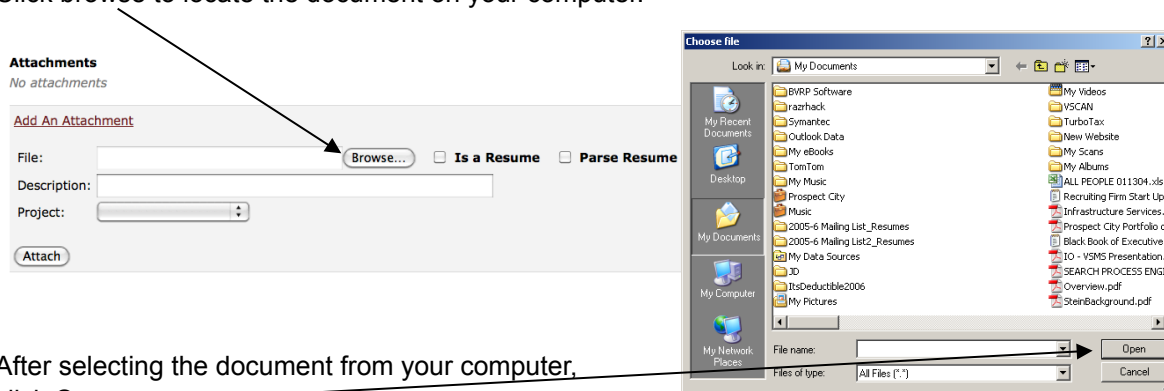
PERSON RECORD – ADD ATTACHMENTS

Users can modify uploaded attachment records. Examples include changing description, project, etc. However, users are not able to modify the attachments themselves. Users must first download the attachment to their computer, make changes, and re-upload the new modified document.

Upload a new Document

Click [Add an Attachment](#).

Click browse to locate the document on your computer.



After selecting the document from your computer, click Open.

On Velvet's upload screen, check the "Is a Resume" box if the document is a resume. If not, enter a description in the description field.

NOTE: If the document specifically addresses a project (such as a candidate write-up), select the project from the drop down list.

ATTACHMENT GUIDELINES

Guidelines for uploading attachments are below.

People Record documents should be limited to resumes, write-ups, references, articles, and other documents specific to the person.

Company Record documents should be limited to the company itself, such as an organization chart. We recommend using outside resources such as Hoovers to maintain company information (rather than uploading it)

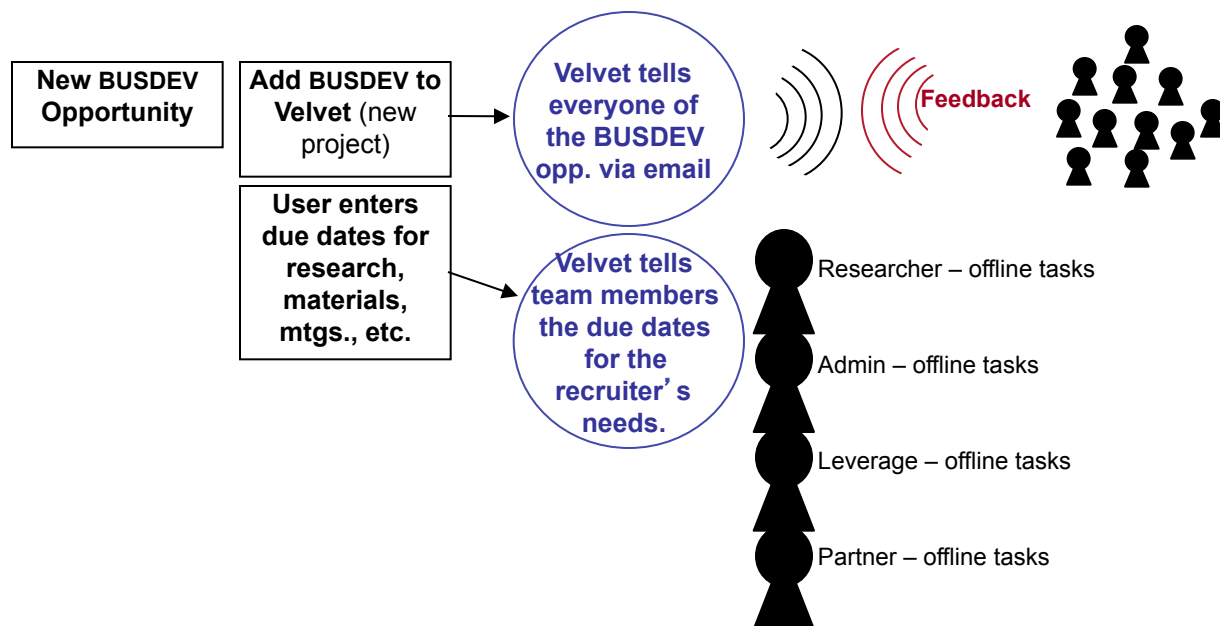
Project Record documents should be limited to information associated with the project, such as contracts, invoices, proposals, presentations, etc. Candidate write-ups belong in people records with the associated project indicated.

Overview

Processing

Velvet is designed to support the firm's processes within search development, search execution, contact management & organization, and internal operations. However, there are aspects of the system that are dependent on offline tasks of the firm's users. For example,

BUSDEV Processing

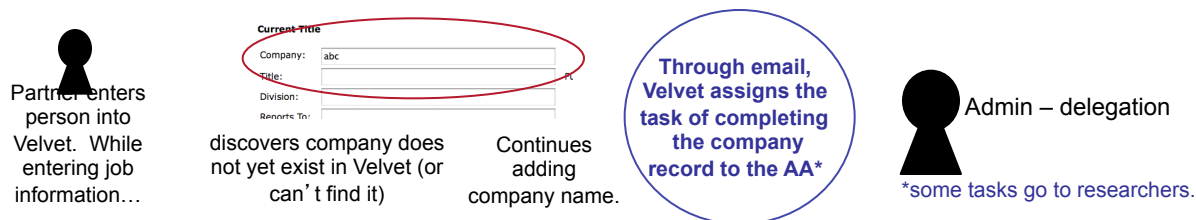


During the BUSDEV process, Velvet captures and houses the information, notifies users, and informs the team of upcoming due dates. However, the team members each have offline tasks associated with meeting those deadlines. Those tasks are defined separately according to firm policies, procedures and functional roles – and may differ across practices.

The same Velvet processes may occur when this BUSDEV converts to a search project too.

Delegation

Velvet also uses communication to protect data integrity by assigning data cleanup tasks to support personnel. These support professionals are better equipped and more efficient to ensure data entry is complete and correct. They include recruiters, admins, and researchers. For example,



BusDev Project

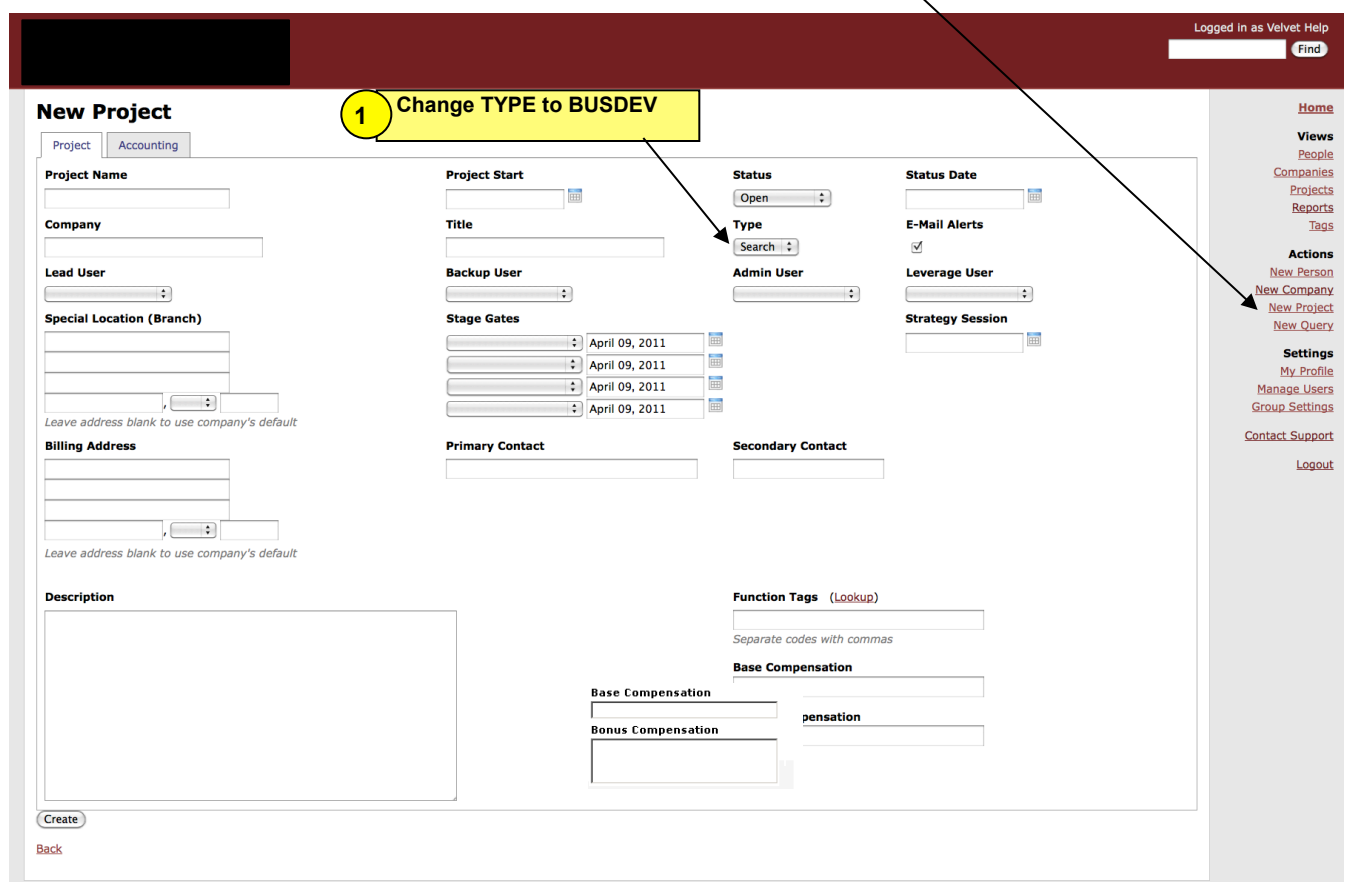
For Velvet's purposes a BusDev project is defined as a business opportunity with a position specifically outlined or communicated by the potential client. It is not intended as a term for broad marketing efforts.

New BUSDEV Entry

Velvet has an important role in support of new BUSDEV opportunities. It is important that every BUSDEV opportunity be entered into Velvet. The system

- solicits feedback from others in the firm, who may have information or contacts who could help
- records credit and delivers information to management about the success of these efforts
- assigns supportive tasks to team members

To enter a new BUSDEV opportunity, click "New Project" from the right-side menu bar.



The screenshot shows the 'New Project' form in the Velvet system. The form is divided into several sections: Project Name, Company, Lead User, Special Location (Branch), Billing Address, Description, Project Start, Title, Backup User, Stage Gates, Primary Contact, Secondary Contact, Status, Type, Admin User, Status Date, E-Mail Alerts, Leverage User, Strategy Session, Function Tags, Base Compensation, and Bonus Compensation. A yellow box with the number '1' and the text 'Change TYPE to BUSDEV' is placed over the 'Type' dropdown menu. An arrow points from the 'New Project' link in the right-side menu bar to the form title. The right-side menu bar includes links for Home, Views, People, Companies, Projects, Reports, Tags, Actions, New Person, New Company, New Project, New Query, Settings, My Profile, Manage Users, Group Settings, Contact Support, and Logout.

STEP ONE

Name your project

The project name does not require any format, but a suggested format for naming standards is shown at the right.

Client Co. Position (Abbrev. Where necessary to control length)

IBM-VP HR

BUSDEV

Logged in as Velvet Help

Find

New Project

Project
Accounting

Project Name

Company

Lead User

Special Location (Branch)

Leave address blank to use company's default

Billing Address

Leave address blank to use company's default

Description

Project Start

Title

Backup User

Stage Gates

<input type="text"/>	<input type="text" value="April 09, 2011"/>
<input type="text"/>	<input type="text" value="April 09, 2011"/>
<input type="text"/>	<input type="text" value="April 09, 2011"/>
<input type="text"/>	<input type="text" value="April 09, 2011"/>

Primary Contact

Status

Type

Admin User

Status Date

E-Mail Alerts
☒

Leverage User

Strategy Session

Secondary Contact

Function Tags

Separate codes

Base Compens

Bonus Comper

Create
Back

- [Home](#)
- Views**
- [People](#)
- [Companies](#)
- [Projects](#)
- [Reports](#)
- [Tags](#)
- Actions**
- [New Person](#)
- [New Company](#)
- [New Project](#)
- [New Query](#)
- Settings**
- [My Profile](#)
- [Manage Users](#)
- [Group Settings](#)
- [Contact Support](#)
- [Logout](#)

2 Select the client company by typing the name. If the company does not appear on the popup list, type the complete name of the company in the field. Upon saving the record, Velvet will add the new company. (Note: Velvet will automatically delegate the task of finishing the company record to your admin)

3 Enter the position/job title for this project.

4 Select team members on the project.

5 Enter the client contacts. If the contacts do not appear in the popup, type the entire name of the person in the field (firstname lastname). Velvet will add the new person. (Note: Velvet will automatically delegate the task of finishing the person records for those you've just entered to your admin)

6 Select stage gates from the lists and corresponding due dates where known. Velvet will notify team members of these stage gates and pending due dates. Velvet will remind team members as these stages approach, to ensure each person is reminded of their responsibilities.

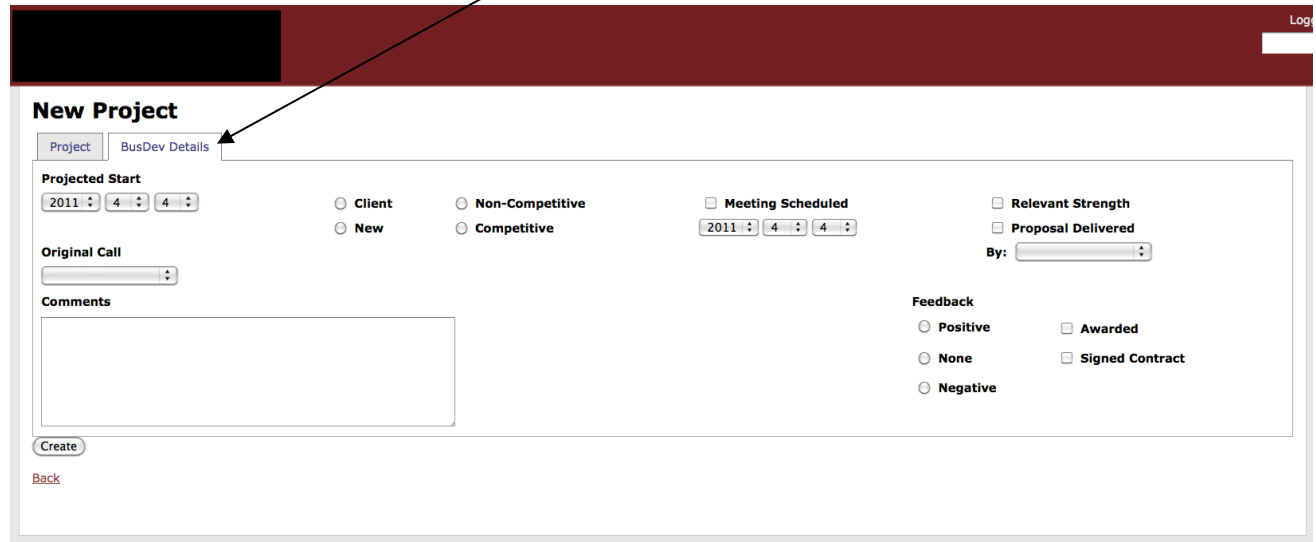
7 Leaving stage gates blank will negate these email notifications. Alternatively, you may select stage gates but turn off email alerts by un-checking the email alerts box.

Fill in Description, Function Tags, Compensation only if known.

CONTINUE >

BUSDEV DETAILS

Before you finish, you must click the BUSDEV Details tab and complete the form.



This tab section is extremely important in presenting information to management. Please be sure to complete this section when creating the BUSDEV.

Projected Start: Indicates when you believe this BUSDEV could become a search.

Client or New: Indicates if this is an existing/past client company or a new one.

Non-competitive/Competitive: This indicates whether or not the BUSDEV opportunity is competitive (other search firms)

Meeting Scheduled: This indicates if a meeting has been scheduled with the potential client to discuss or pitch.

Relevant Strength: This indicates if the project/position is one that falls within the firm's relevant strength.

Proposal Delivered (& Date): This indicates if a proposal was delivered to the potential client for this particular project.

Original Call: Indicate who received the original call about the search project. This relates to origination credit.

Description: this description is NOT focused on the position responsibilities, but rather a description of the opportunity, potential fees, timing, likelihood, next steps, etc. This field is also used to update as the BUSDEV status changes. This information can presented in staff meetings, updates and is used to further assess the status and likelihood of the BUSDEV becoming a search.

Feedback: If/When the user receives feedback about the status of the project from the potential client, the user should select whether the feedback was positive or negative. This will help in assessing the likelihood of a win.

Awarded: Indicates if the user has been awarded the project verbally or via email. This indicator does not reflect an actual win until the firm receives a signed contract.

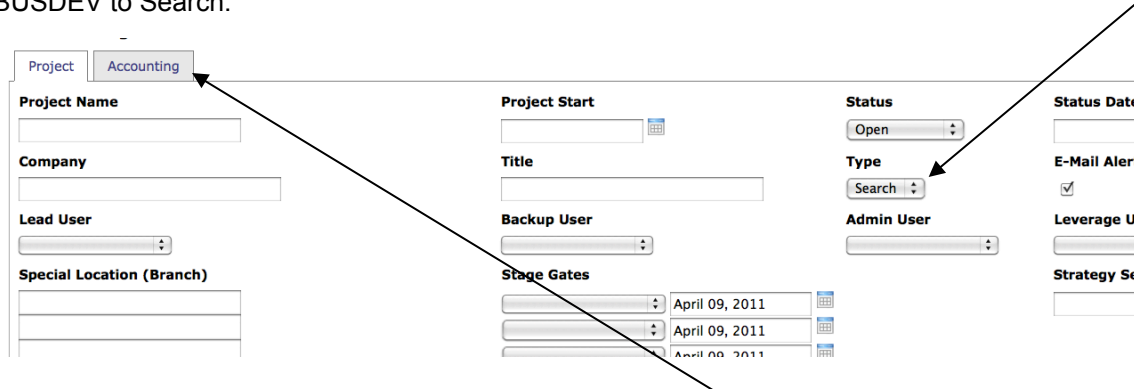
Click Create When Done

Search Awarded

A search can be entered or activated in Velvet in one of two ways:

Converting a BUSDEV to a Search

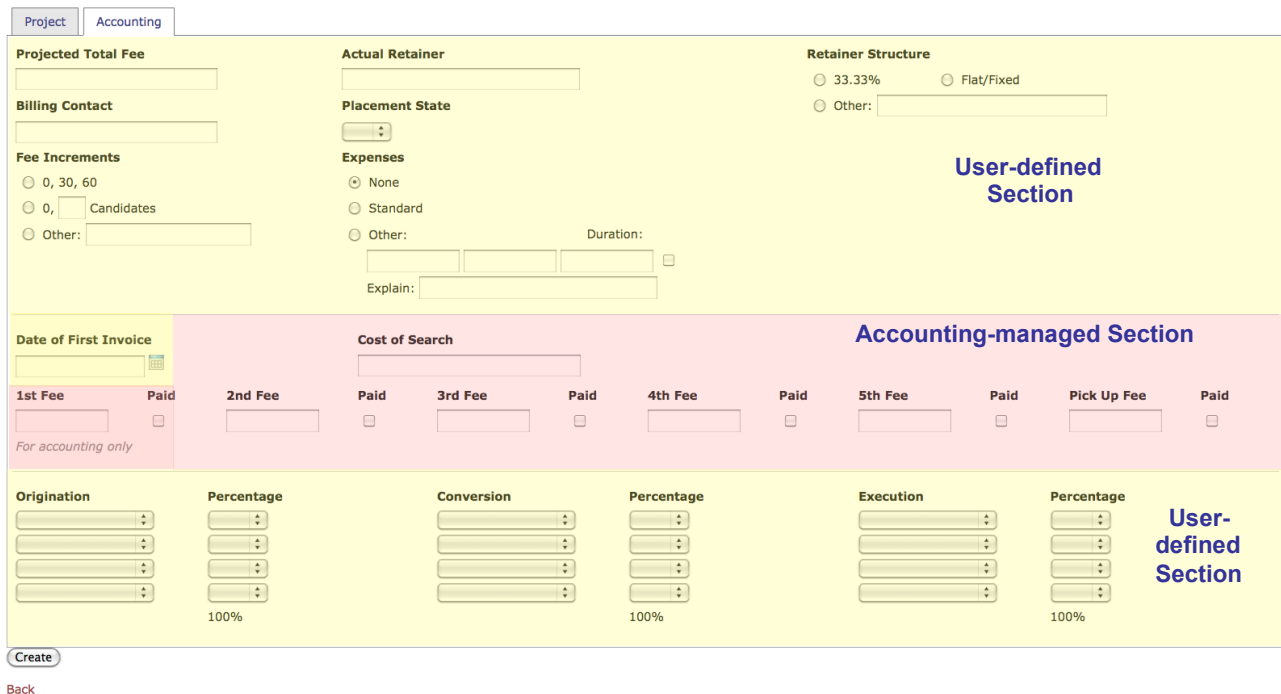
The user can convert a BUSDEV to a search by clicking on the BUSDEV project and clicking EDIT (upper right) to edit the BUSDEV record. Within the BUSDEV record, the user should first change the TYPE field from BUSDEV to Search.



The screenshot shows the Velvet project form with the 'Accounting' tab selected. The 'Type' dropdown menu is highlighted with an arrow, and the 'Accounting' tab is also highlighted with an arrow. The form includes fields for Project Name, Company, Lead User, Special Location (Branch), Project Start, Title, Backup User, Stage Gates, Status, Admin User, Status Date, E-Mail Alert, Leverage User, and Strategy Set.

This will “hide” the BUSDEV tab and instead display the accounting tab. You may now edit any details associated with this opportunity, including job title, address, description, etc. In addition, you will need to click on the accounting tab and complete that form as well (see accounting tab section below).

Accounting Tab



The screenshot shows the Velvet Accounting Tab form. It is divided into two main sections: the 'User-defined Section' (top) and the 'Accounting-managed Section' (bottom). The 'User-defined Section' includes fields for Projected Total Fee, Billing Contact, Fee Increments, Actual Retainer, Placement State, Expenses, and Retainer Structure. The 'Accounting-managed Section' includes fields for Date of First Invoice, Cost of Search, and a table for fees (1st Fee, 2nd Fee, 3rd Fee, 4th Fee, 5th Fee, Pick Up Fee) with 'Paid' checkboxes. Below the fees table is a table for Origination, Conversion, and Execution, each with a 'Percentage' field and a '100%' label. The form also includes 'Create' and 'Back' buttons at the bottom.

CONTINUE >

Search Awarded

Converting a BUSDEV to a Search (continued)

Accounting Tab

<p>1 Projected Total Fee</p> <input type="text"/>	<p>2 Actual Retainer</p> <input type="text"/>	<p>3 Retainer Structure</p> <p> <input type="radio"/> 33.33% <input type="radio"/> Flat/Fixed <input type="radio"/> Other: <input type="text"/> </p>
<p>4 Billing Contact</p> <input type="text"/>	<p>5 Fee Increments</p> <p> <input type="radio"/> 0, 30, 60 <input type="radio"/> 0, <input type="text"/> Candidates <input type="radio"/> Other: <input type="text"/> </p>	<p>6 Expenses</p> <p> <input checked="" type="radio"/> None <input type="radio"/> Standard <input type="radio"/> Other: <input type="text"/> Duration: <input type="text"/> <input type="checkbox"/> Explain: <input type="text"/> </p>
<p>7 Billing Address</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<p>8 Placement State</p> <input type="text"/>	

- | | |
|---|---|
| <p>1 Expected total fee when completed</p> <p>3 What is fee based on?</p> <p>5 When will we bill client?</p> <p>7 What is the address to send invoices?</p> | <p>2 What <input type="text"/> is billing client</p> <p>4 Who is the billing contact (first, last name)</p> <p>6 How will we structure expense reimbursement from the client?</p> <p>8 Where will the hire reside? (tax purposes)</p> |
|---|---|

<p>9 Date of First Invoice</p> <input type="text"/> 2007 <input type="text"/> 5 <input type="text"/> 17	<p>11 Cost of Search</p> <input type="text"/>												
<p>10 1st Fee Paid 2nd Fee Paid 3rd Fee Paid 4th Fee Paid 5th Fee Paid Pick Up Fee Paid</p> <table border="0"> <tr> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> </tr> </table> <p><i>For accounting only</i></p>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>		

- | | |
|--|---|
| <p>9 When the first invoice is to be sent</p> <p>11 Cost of search is managed by accounting. It can be the sum of out-of-pocket expenses, non-reimbursable resources, or hours manned by researchers and leverage recruiters. Please contact the accounting department with questions.</p> | <p>10 Admin and accounting will enter fee amounts when invoices are sent. Accounting will mark when these invoices are paid. This is for informational purposes only. Exact information resides within the accounting system. Please contact the accounting department with questions.</p> |
|--|---|

The OCE form must be completed at the start of a search project, but can be modified throughout the life of the search project. These selections will help determine who gets credit for origination (bringing the opportunity to the firm), conversion (winning the search), and execution (doing the search).

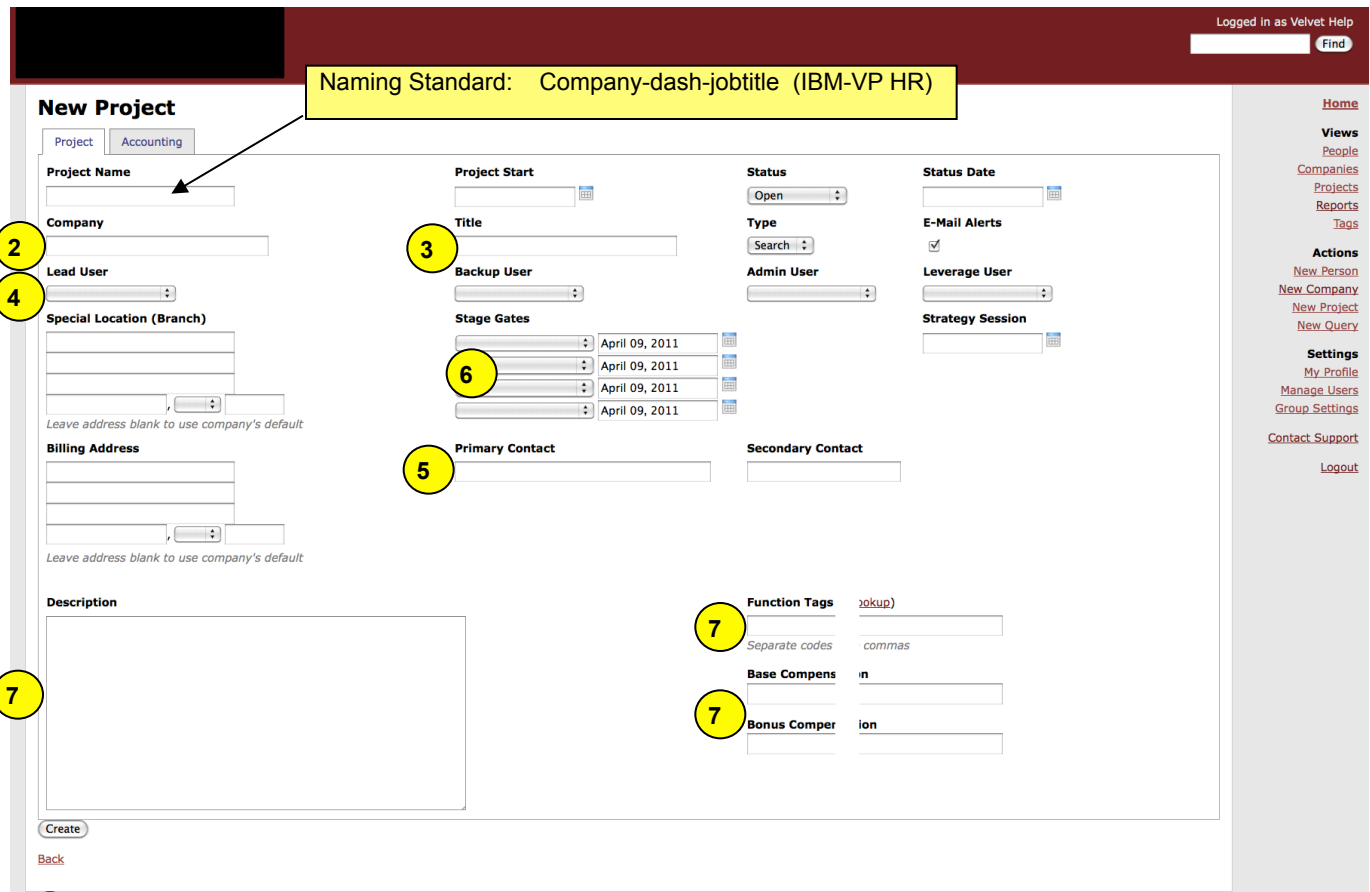
Origination	Percentage	Conversion	Percentage	Execution	Percentage
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	100%		100%		100%

Search Awarded

In addition to converting a BUSDEV to a search, the user may enter a new search project if no BUSDEV record exists. This usually happens in the event the project is awarded without going through a BUSDEV stage.

Entering a New Search

The user can enter a new search by clicking “New Project” from the right menu bar. When doing so, the new project TYPE defaults to search, displaying the accounting tab.



New Project

Project Start: [Date Picker]

Status: Open

Status Date: [Date Picker]

Type: Search

Admin User: [Dropdown]

E-Mail Alerts: ☒

Leverage User: [Dropdown]

Strategy Session: [Date Picker]

Project Name: [Text Field]

Company: [Text Field]

Lead User: [Dropdown]

Special Location (Branch): [Text Field]

Billing Address: [Text Field]

Description: [Text Area]

Primary Contact: [Text Field]

Secondary Contact: [Text Field]

Stage Gates: [List of dates]

Function Tags: [Text Field]

Base Compens: [Text Field]

Bonus Comper: [Text Field]

Create

Back

Naming Standard: Company-dash-jobtitle (IBM-VP HR)

2 Select the client company by typing the name. If the company does not appear on the popup list, type the complete name of the company in the field. Upon saving the record, Velvet will add the new company. (Note: Velvet will automatically delegate the task of finishing the company record to your admin)

3 Enter the position/job title for this project. 4 Select team members on the project.

5 Enter the client contacts. If the contacts do not appear in the popup, type the entire name of the person in the field (firstname lastname). Velvet will add the new person. (Note: Velvet will automatically delegate the task of finishing the person records for those you've just entered to your admin)

6 Select stage gates from the lists and corresponding due dates where known. Velvet will notify team members of these stage gates and pending due dates. Velvet will remind team members as these stages approach, to ensure each person is reminded of their responsibilities.

Leaving stage gates blank will negate these email notifications. Alternatively, you may select stage gates but turn off email alerts by un-checking the email alerts box.

7 Fill in Description, Function Tags, Compensation only if known.

CONTINUE >

Search Awarded

Entering a New Search (continued)

Function Tags

Description

Create

Function Tags [\(Lookup\)](#)

Separate codes with commas

Base Compensation

Bonus Compensation

8

Function Tags are codes that define the position and it's responsibilities as they relate to other projects and contacts in Velvet. Every job, in a project or within a person's work history can have a function tag associated with it. This tag is used to group individuals and projects together for future use.

Your frequently used tags are displayed below the field in red highlighted links.

I see the tag on my screen (in red): If the tag you prefer to use for this project exists on your screen, you can simply click on it to add it to the function tag field.

I do not see the tag I prefer on my screen: If the tag you wish to use is not listed on your screen, click [\(Lookup\)](#) to find and select a tag or tags to enter in the function tag field.

FAQs

To select a function tag, click on it. Velvet will add it to the function tag field for you.

There isn't one tag that describes the function I need: **may I select multiple tags?** Absolutely. We encourage users to add as many tags as necessary to describe the position.

Going forward, these newly used tags will now appear below your function tag list for future needs.

My frequently-used function tag list is long, or irrelevant. What can I do to clean it up? From the right menu bar, you can click on "My Profile" and Edit (upper right). Within this record you will see the list of frequently-used tags. Here you may modify your list. Be sure to remove stray commas, etc.

CONTINUE >

Search Awarded

Entering a New Search (continued)

Compensation Fields

Description

Function Tags [\(Lookup\)](#)

Separate codes with commas

Base Compensation

Bonus Compensation

Create

9

Compensation within the project record does not require a specific standard format. This information is considered internal.

Base Compensation: self-explanatory

Bonus Compensation: may include actual dollar figures, percentages, ranges, benefits and other nomenclature specific to your practice. This is a text-friendly field, so no restrictions here.

EMAIL NOTIFICATIONS

Click When Done

Upon creating a search project record or converting a BUSDEV, Velvet will immediately send a notification to all employees announcing the project. Beyond communication, this is also an effort to solicit feedback and ideas to assist on the project.

In addition, the following offline tasks may occur: Accounting can create appropriate records, AAs will review data for cleanup, complete contact information, prepare correspondence, etc.

Company Records

6

Walgreen Co. Company

Created on Apr 26, 2007, last updated 4 months ago

Edit

Report (Download) | E-Mail Researcher | E-Mail Assistant

Home

Views

People

Companies

Projects

Reports

Tag

Actions

New Person

New Company

New Project

New Query

Settings

My Profile

Manage Users

Group Settings

Contact Support

Logout

1

Off Limits: Expires 2011-11-01

4

Parent Company Of

None

Division Of

None

2

Address

200 Wilmot Rd.
Deerfield, IL 60015

Phone

(847) 914-2500

Fax

(847) 914-2804

7

3

Industries

[Drug, Health & Beauty Product Retailing](#)

Website

<http://www.walgreens.com>

5

Tags (Edit)

None

8

Description

Walgreen offers an old-fashioned tonic for fiscal fitness: quality over quantity and homespun growth rather than growth through acquisitions. It works. Walgreen operates some 6,250 stores in 49 states and Puerto Rico, and has three mail order facilities. Prescription drugs account for nearly two-thirds of sales; the rest comes from general merchandise, over-the-counter medications, cosmetics, and groceries. Walgreen usually builds rather than buys stores, so it can pick prime locations. For added convenience, more than 80% of its stores offer drive-through pharmacies, and almost all offer one-hour photo processing. Walgreen withdrew its \$3 billion bid to acquire Longs Drug Stores (topping rival CVS's offer).

2007 Sales \$53.8 billion

9

Projects

Project	Title
Current People	
<input type="checkbox"/> Name	Title
<input type="checkbox"/> Alan McNally	Chairman
<input type="checkbox"/> Carla Moradi	Divisional VP, Enterprise Shared Services
<input type="checkbox"/> Chris Domzalski	Director, Internal Audit
<input type="checkbox"/> Colleen Branch	Vice President, Customer Care Centers
<input type="checkbox"/> Dan Doyle	Innovation CFO
Previous People	
<input type="checkbox"/> Name	Title
<input type="checkbox"/> Kenneth Weigand	SVP, Human Resources

10

Started

Unknown

Unknown

Apr 22, 2009

Unknown

Mar 21, 2006

11

Ended

Feb 02, 2009

12

Attachments

No attachments

Add An Attachment

- 1 Off Limits Indicator highlights those companies that are designated off-limits to recruitment (poaching).
- 2 Contact Information (This location)
- 3 Industry Classification is selected from a drop down list rather than SIC codes.
- 4 Parent/Division Information is listed. Each Division is listed. Divisions can be brands, plants, or locations.
- 5 Tags are used to group companies by user-defined codes (mailings, BD targets, etc.)
- 6 Email Researcher/Admin allows user to open and send an email with embedded link to this record.
- 7 Stock Ticker displays today's performance and when clicked, will display Yahoo! based company information.
- 8 Description contains a description of the company and may contain special firm-related notes (searchable).
- 9 Projects lists any projects the firm has done for this company or division.
- 10 Current People lists any current employees of the company.
- 11 Previous People lists any individuals who have this company designated as a previous employer.
- 12 Attachments list documents stored under this record.

Company Records

Looking for a Company

To look for a company, enter part of the company name in the FIND box in the upper right corner.

Looking for People who currently work for a Company

You MUST look up the company in the FIND box (above) and go into the company record to find individuals currently working there. Do not depend on the FIND results to display current and former employees. They are listed within the company record.

Note About Quick-Add (CREATING A NEW COMPANY RECORD FROM WHERE YOU ARE)

During the process of adding a person's job history or adding a new project, users have the option of "Quick-Adding" a company. This feature allows a user to bypass interruptions normally caused by having to first add a company before completing a project or person record. Quick-adds are instantly sent to the user's ADMIN for record completion. In this case an emailed task is delivered from Velvet to the user's ADMIN with an embedded link to the newly created company in the email. This allows recruiters to automatically delegate data management tasks to support personnel.

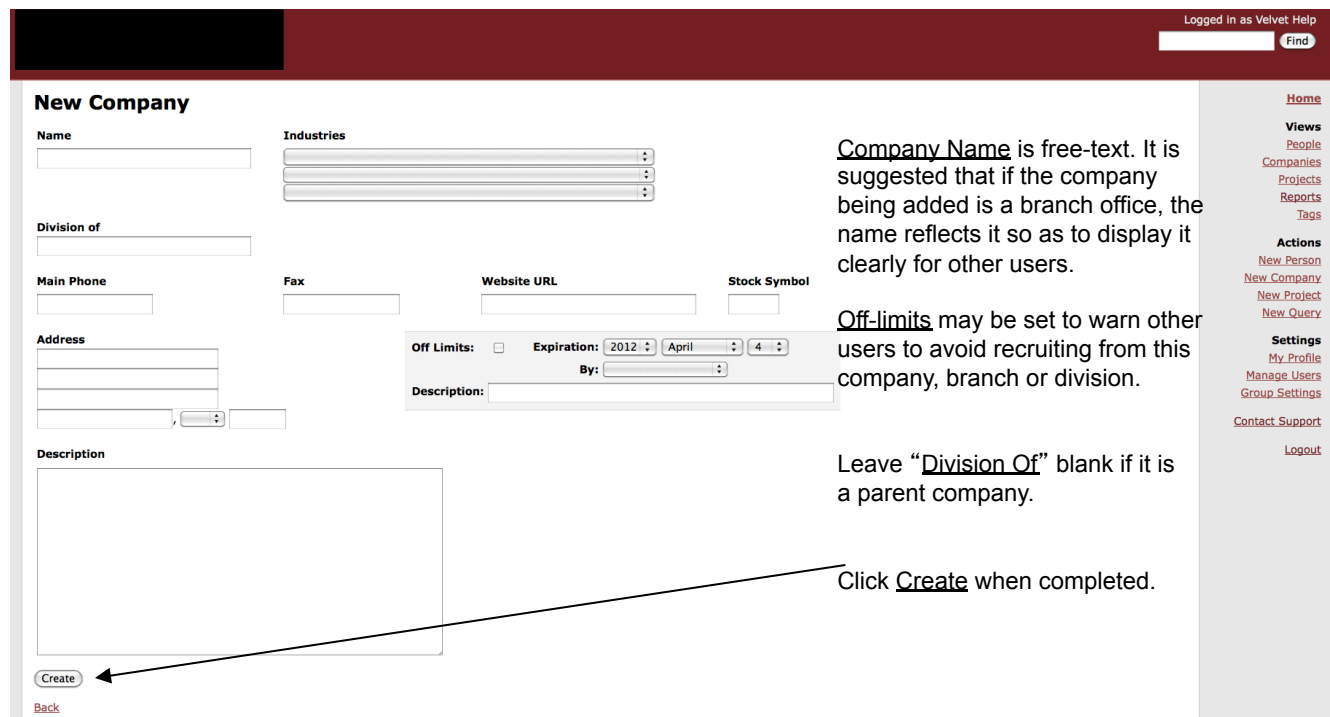
Quick-added companies can be accessed via the email link by support personnel who can edit and complete those records on behalf of the recruiter.

Adding (or Editing) a Company

AFTER FIRST USING THE FIND BOX TO SEE IF THE COMPANY ALREADY EXISTS IN Velvet, the user can add a new company record. Here's how:

To Add a Company, click "New Company" on the right-side menu.

(To Edit an existing company, find the company and click EDIT in the upper right corner.)



New Company

Name:

Industries:

Division of:

Main Phone:

Fax:

Website URL:

Stock Symbol:

Address:

Off Limits: ☐ Expiration: 2012 April 4 By:

Description:

[Back](#)

[Home](#)

Views

[People](#)

[Companies](#)

[Projects](#)

[Reports](#)

[Tags](#)

Actions

[New Person](#)

[New Company](#)

[New Project](#)

[New Query](#)

Settings

[My Profile](#)

[Manage Users](#)

[Group Settings](#)

[Contact Support](#)

[Logout](#)

Click Create when completed.

Company Records

TAGGING a Company Record

Companies may be grouped together by designated a TAG or code. Each company that contains this TAG will form a list for BD targeting, mailings, etc. TAGS are managed by a central source in the firm (usually an administrator), so please be careful when creating new TAGS. A duplicate tag or a long tag name can create problems for other users.

Logged in as Velvet Help

Find

3Com Company
Created on Mar 28, 2011, last updated 6 days ago

[Report \(Download\)](#) | [E-Mail Researcher](#) | [E-Mail Assistant](#)

[Edit](#)

[Home](#)

Parent Company Of
None

Division Of
None

Ticker
None

Address
None

Phone
None

Fax
None

Industries
None

Website
None

Tags (Edit)
 [Save](#) (Separate tags by commas)

Description
None

Projects
No projects

Current People

<input type="checkbox"/>	Name
<input type="checkbox"/>	Alex Sarin

Views
[People](#)
[Companies](#)
[Projects](#)
[Reports](#)
[Tags](#)

Actions
[New Person](#)
[New Company](#)
[New Project](#)
[New Query](#)

Settings
[My Profile](#)
[Manage Users](#)
[Group Settings](#)
[Contact Support](#)
[Logout](#)

Existing Tags are located under the tag field. To designate the company using an existing tag, simply click on it. The tag's text will be automatically entered in the field.

To create a new tag, simply add a comma and space after a previous tag (if one exists) and type in the new tag (be sure it doesn't already exist in the list below the tag field).

Click Save when complete.

VIEW a List of All Tagged Companies

To view a list of all tagged companies, simply click on the tag (red, highlighted) within the company record.

3Com Company
Created on Mar 28, 2011, last updated 6 days ago

[Report \(Download\)](#) | [E-Mail Researcher](#) | [E-Mail Assistant](#)

[Edit](#)

[Home](#)

Parent Company Of
None

Division Of
None

Ticker
None

Address
None

Phone
None

Fax
None

Industries
None

Website
None

Tags (Edit)

Description
None

Projects
No projects

Current People

<input type="checkbox"/>	Name
<input type="checkbox"/>	Alex Sarin

Tagged with "BD"

People

<input type="checkbox"/>	Last Name	First Name	Current Title
<input type="checkbox"/>	Aasen	Thomas	Executive Vice President, Chief Fin

Companies

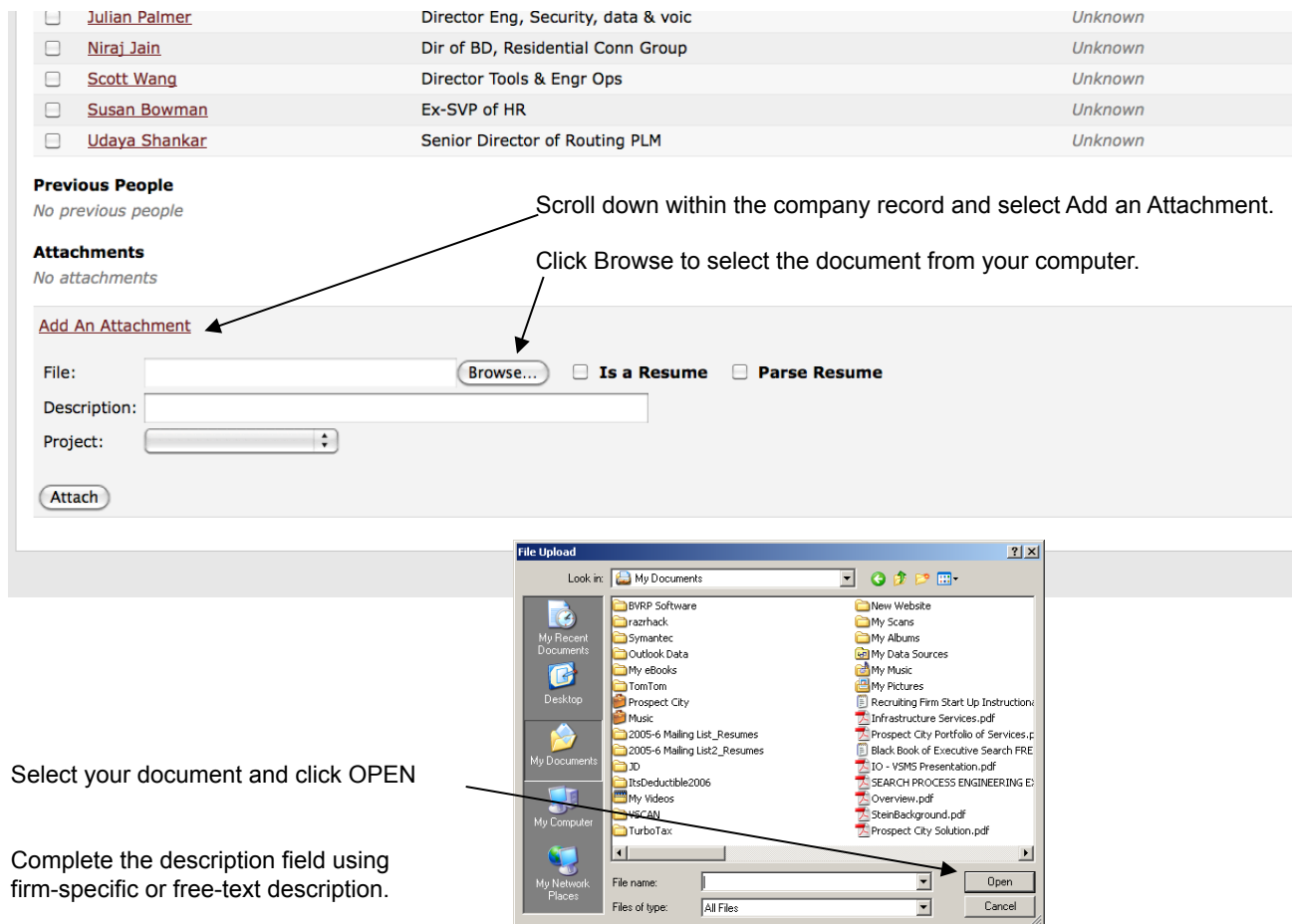
<input type="checkbox"/>	Name	City
<input type="checkbox"/>	2Wire	None
<input type="checkbox"/>	3Com	None

The results (right) will list any people and companies marked with the tag.

Company Records

STORING DOCUMENTS in a Company Record

Users can store company-related documents in Velvet within the company records. However, it is highly recommended that users only store high-value information such as organization charts, etc. Information that is readily available and supported by other businesses such as Hoovers should not be stored in Velvet (examples include company snapshot from Hoovers).



Scroll down within the company record and select Add an Attachment.

Click Browse to select the document from your computer.

Select your document and click OPEN

Complete the description field using firm-specific or free-text description.

DO NOT SELECT A PROJECT *unless* document is specific to intelligence on a single project and is not useful to any others.

ATTACHMENT GUIDELINES

Guidelines for uploading attachments are below.

People Record documents should be limited to resumes, write-ups, references, articles, and other documents specific to the person.

Company Record documents should be limited to the company itself, such as an organization chart. We recommend using outside resources such as Hoovers to maintain company information (rather than uploading it)

Project Record documents should be limited to information associated with the project, such as contracts, invoices, proposals, presentations, etc. Candidate write-ups belong in people records with the associated project indicated.

Printing Information in Velvet

Users can print any information listed on the page (lists, pipelines, people profiles, etc.) by selecting FILE, PRINT from the browser window - OR -

At the top of each person record, project record and company record is a link called “Report”. Click it to download a formatted pdf profile.

Reports

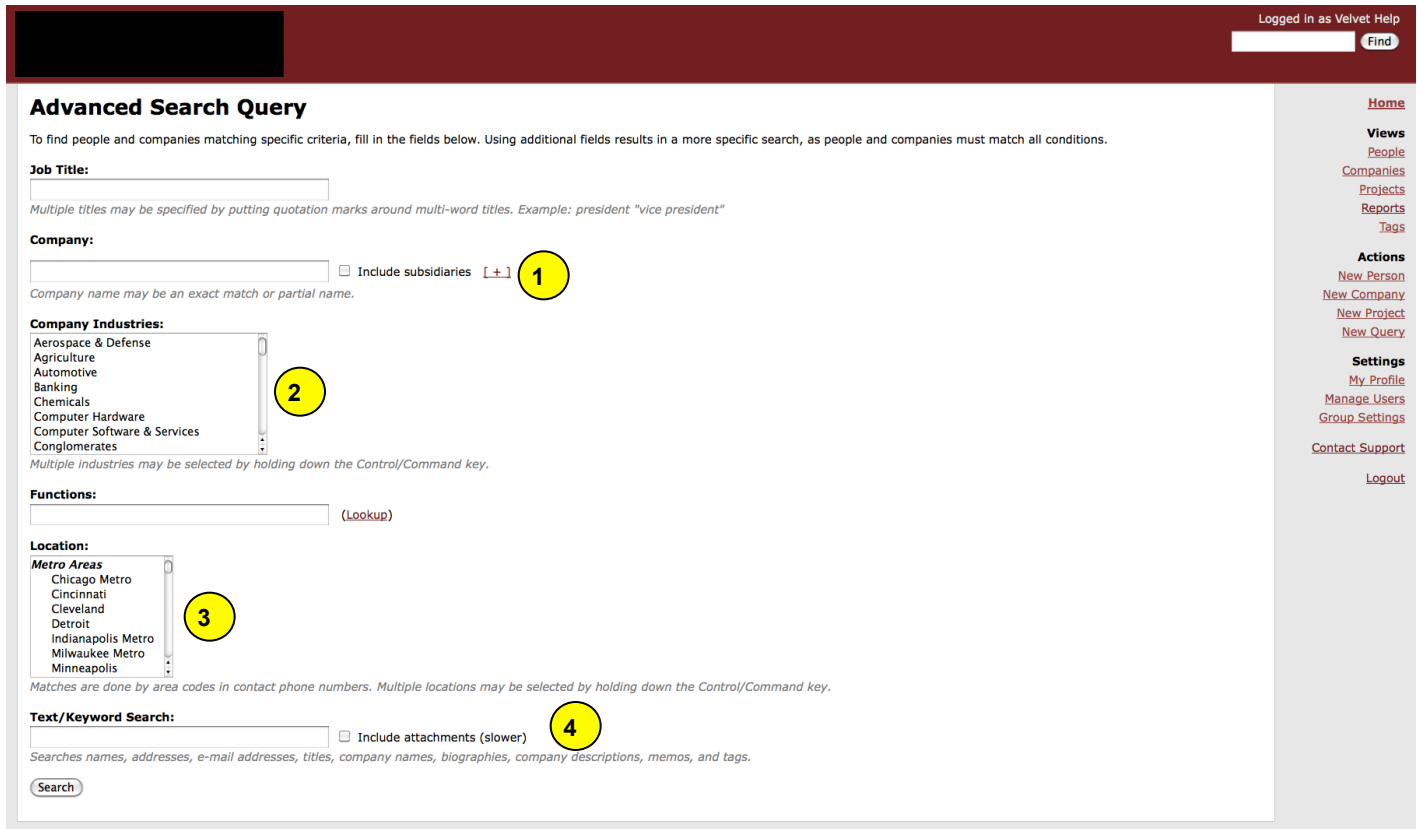
New reports can be requested through the firm and added to this list on a permanent basis.

If you need further assistance, contact support@prospectcity.com

Advanced Query Function

Performing an Advanced Query

Users can perform advanced queries in Velvet by clicking on “New Query” on the right-side menu.



The screenshot shows the 'Advanced Search Query' page in the Velvet application. The page has a dark red header with the Velvet logo and a 'Find' button. The main content area is white and contains several search fields. On the right side, there is a vertical menu with links for Home, Views, People, Companies, Projects, Reports, Tags, Actions, New Person, New Company, New Project, New Query, Settings, My Profile, Manage Users, Group Settings, Contact Support, and Logout.

The search fields are as follows:

- Job Title:** A text input field.
- Company:** A text input field with a checkbox labeled 'Include subsidiaries' and a '+' symbol. A yellow circle with the number 1 is next to the '+' symbol.
- Company Industries:** A dropdown menu showing a list of industries: Aerospace & Defense, Agriculture, Automotive, Banking, Chemicals, Computer Hardware, Computer Software & Services, and Conglomerates. A yellow circle with the number 2 is next to the dropdown arrow.
- Functions:** A text input field with a '(Lookup)' button.
- Location:** A dropdown menu showing a list of metro areas: Chicago Metro, Cincinnati, Cleveland, Detroit, Indianapolis Metro, Milwaukee Metro, and Minneapolis. A yellow circle with the number 3 is next to the dropdown arrow.
- Text/Keyword Search:** A text input field with a checkbox labeled 'Include attachments (slower)' and a yellow circle with the number 4 next to it.

At the bottom of the search fields, there is a 'Search' button.

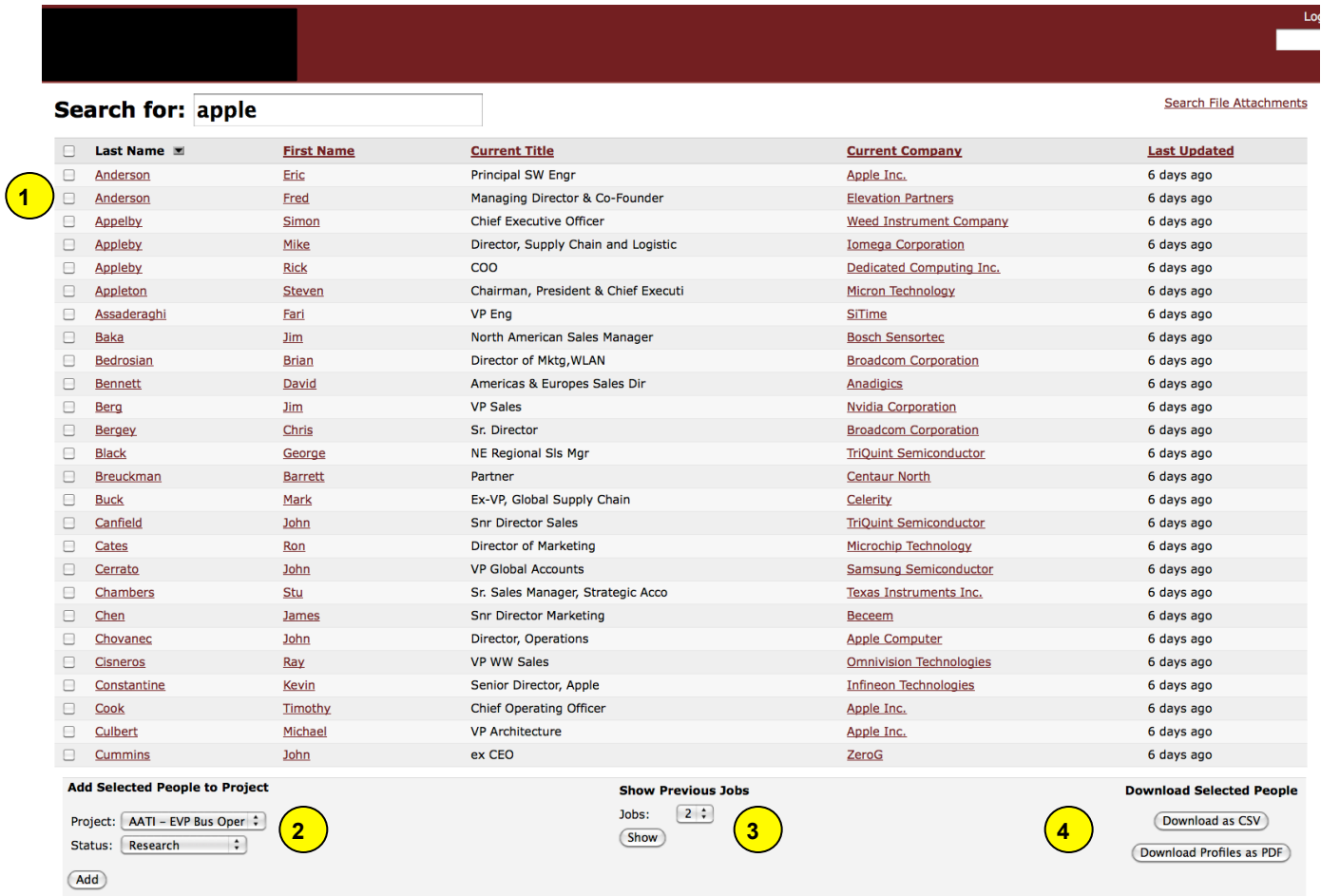
Performing a query is fairly self-explanatory. Enter information in appropriate search fields to expand or narrow your search results.

- 1 You may select a company by typing in the field. To add more companies, click the + symbol to the right of the field.
- 2 Company industry codes are defined within each company record. Be sure the company database codes are completed before relying on this as a valid filter.
- 3 Location is defined by people record area codes within the various phone fields. Because address fields are not often completed, area codes provides the ability to access more complete records. Phone fields searched do not include assistant phone numbers.
- 4 Text/Keyword searches most fields in the database and can be expanded to search attachments.

What to do with List Results

All list results have a similar function whether they are the result of a find, a query, a search pipeline or even a company/employee list.

When viewing a list, users have several options with the results:



Search for: Search File Attachments

<input type="checkbox"/>	Last Name	First Name	Current Title	Current Company	Last Updated
<input type="checkbox"/>	Anderson	Eric	Principal SW Engr	Apple Inc.	6 days ago
<input type="checkbox"/>	Anderson	Fred	Managing Director & Co-Founder	Elevation Partners	6 days ago
<input type="checkbox"/>	Appelby	Simon	Chief Executive Officer	Weed Instrument Company	6 days ago
<input type="checkbox"/>	Appleby	Mike	Director, Supply Chain and Logistic	Iomega Corporation	6 days ago
<input type="checkbox"/>	Appleby	Rick	COO	Dedicated Computing Inc.	6 days ago
<input type="checkbox"/>	Appleton	Steven	Chairman, President & Chief Executi	Micron Technology	6 days ago
<input type="checkbox"/>	Assaderaghi	Fari	VP Eng	SiTime	6 days ago
<input type="checkbox"/>	Baka	Jim	North American Sales Manager	Bosch Sensortec	6 days ago
<input type="checkbox"/>	Bedrosian	Brian	Director of Mktg,WLAN	Broadcom Corporation	6 days ago
<input type="checkbox"/>	Bennett	David	Americas & Europes Sales Dir	Anadigics	6 days ago
<input type="checkbox"/>	Berg	Jim	VP Sales	Nvidia Corporation	6 days ago
<input type="checkbox"/>	Bergey	Chris	Sr. Director	Broadcom Corporation	6 days ago
<input type="checkbox"/>	Black	George	NE Regional Sls Mgr	TriQuint Semiconductor	6 days ago
<input type="checkbox"/>	Breuckman	Barrett	Partner	Centaur North	6 days ago
<input type="checkbox"/>	Buck	Mark	Ex-VP, Global Supply Chain	Celerity	6 days ago
<input type="checkbox"/>	Canfield	John	Snr Director Sales	TriQuint Semiconductor	6 days ago
<input type="checkbox"/>	Cates	Ron	Director of Marketing	Microchip Technology	6 days ago
<input type="checkbox"/>	Cerrato	John	VP Global Accounts	Samsung Semiconductor	6 days ago
<input type="checkbox"/>	Chambers	Stu	Sr. Sales Manager, Strategic Acco	Texas Instruments Inc.	6 days ago
<input type="checkbox"/>	Chen	James	Snr Director Marketing	Beceem	6 days ago
<input type="checkbox"/>	Chovanec	John	Director, Operations	Apple Computer	6 days ago
<input type="checkbox"/>	Cisneros	Ray	VP WW Sales	Omnivision Technologies	6 days ago
<input type="checkbox"/>	Constantine	Kevin	Senior Director, Apple	Infineon Technologies	6 days ago
<input type="checkbox"/>	Cook	Timothy	Chief Operating Officer	Apple Inc.	6 days ago
<input type="checkbox"/>	Culbert	Michael	VP Architecture	Apple Inc.	6 days ago
<input type="checkbox"/>	Cummins	John	ex CEO	ZeroG	6 days ago

Add Selected People to Project **Show Previous Jobs** **Download Selected People**

Project: **2** Jobs: **3** **4**

Status: **1**

When viewing a list, users have several options with the results:

- 1** Users can select individual records or select entire lists by checking the top box on the header. Upon checking any box, the bottom of the results list will expand to reveal a number of choices:
- 2** Users can associate checked people records with another search project. Select the search and select the desired status of the individuals on the destination search project (research, candidate, etc.)
- 3** Users can opt to list previous job titles to better review the list.
- Users can download the entire list in csv format (Excel) for merge, imports, etc.
- 4** Users can download all of the profiles of checked individuals to be printed in pdf format.

How to copy/migrate people records from one search to another.

It is common for a recruiter to request the individuals from an old search be copied to a new, relevant one when it begins.

While viewing an existing search and the pipeline of people under it, check individual records of select the entire list by checking the box on the top header.

1

<input type="checkbox"/>	Anderson	Eric	Principal SW Engr	Apple Inc.	6 days ago
<input type="checkbox"/>	Anderson	Fred	Managing Director & Co-Founder	Elevation Partners	6 days ago
<input type="checkbox"/>	Appelby	Simon	Chief Executive Officer	Weed Instrument Company	6 days ago
<input type="checkbox"/>	Appleby	Mike	Director, Supply Chain and Logistic	Iomega Corporation	6 days ago
<input type="checkbox"/>	Appleby	Rick	COO	Dedicated Computing Inc.	6 days ago
<input type="checkbox"/>	Appleton	Steven	Chairman, President & Chief Executi	Micron Technology	6 days ago
<input type="checkbox"/>	Assaderaghi	Fari	VP Eng	SiTime	6 days ago
<input type="checkbox"/>	Baka	Jim	North American Sales Manager	Bosch Sensortec	6 days ago
<input type="checkbox"/>	Bedrosian	Brian	Director of Mktg,WLAN	Broadcom Corporation	6 days ago
<input type="checkbox"/>	Bennett	David	Americas & Europes Sales Dir	Anadigics	6 days ago
<input type="checkbox"/>	Berg	Jim	VP Sales	Nvidia Corporation	6 days ago
<input type="checkbox"/>	Bergey	Chris	Sr. Director	Broadcom Corporation	6 days ago
<input type="checkbox"/>	Black	George	NE Regional Sls Mgr	TriQuint Semiconductor	6 days ago
<input type="checkbox"/>	Breuckman	Barrett	Partner	Centaur North	6 days ago
<input type="checkbox"/>	Buck	Mark	Ex-VP, Global Supply Chain	Celerity	6 days ago
<input type="checkbox"/>	Canfield	John	Snr Director Sales	TriQuint Semiconductor	6 days ago
<input type="checkbox"/>	Cates	Ron	Director of Marketing	Microchip Technology	6 days ago
<input type="checkbox"/>	Cerrato	John	VP Global Accounts	Samsung Semiconductor	6 days ago
<input type="checkbox"/>	Chambers	Stu	Sr. Sales Manager, Strategic Acco	Texas Instruments Inc.	6 days ago
<input type="checkbox"/>	Chen	James	Snr Director Marketing	Beceem	6 days ago
<input type="checkbox"/>	Chovanec	John	Director, Operations	Apple Computer	6 days ago
<input type="checkbox"/>	Cisneros	Ray	VP WW Sales	Omnivision Technologies	6 days ago
<input type="checkbox"/>	Constantine	Kevin	Senior Director, Apple	Infineon Technologies	6 days ago
<input type="checkbox"/>	Cook	Timothy	Chief Operating Officer	Apple Inc.	6 days ago
<input type="checkbox"/>	Culbert	Michael	VP Architecture	Apple Inc.	6 days ago
<input type="checkbox"/>	Cummins	John	ex CEO	ZeroG	6 days ago

Add Selected People to Project

Project: AATI - EVP Bus Oper

Status: Research

2

Show Previous Jobs

Jobs: 2

3

Download Selected People

4

Once you have checked the people records, scroll to the bottom of the section and look for the menu that appears (see above)

- 2** Users can copy/associate checked people records with another search project. Select the search and select the desired status of the individuals on the destination search project (research, candidate, etc.)
- 3** Users can opt to list previous job titles to better review the list.
- 4** Users can download the entire list in csv format (Excel) for merge, imports, etc.
- Users can download all of the profiles of checked individuals to be printed in pdf format.

Using the feature to populate or connect people records

New for 2011, the database now allows for a connection between people records and their LinkedIn profiles.

The feature can be used to link the database's person record to their record in LinkedIn. Users can view both records by automatically jumping back and forth between the database and LinkedIn in order to check the status of an individual.

In addition, a user can copy the basic LinkedIn profile information from LinkedIn directly into the database.

WARNING: Importing data from LinkedIn into the database will not "update" over current information. To protect data integrity, importing data from LinkedIn can create duplicate job titles and may require a cleanup when complete. We always recommend linking the two and not performing an import unless the person record is empty.


AUTHORIZE YOUR ACCOUNT

Authorize LinkedIn Access: Your LinkedIn account must be "connected" via the database. LinkedIn requires you to authorize the database to access records on your behalf.

- 1) Go to [My Profile](#) on the right-side menu.
- 2) Under the section called "LinkedIn Status" click connect.


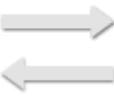

Username VelvetHelp	Active Yes	Access Level Administrator	E-Mail support@prospectcity.com
Office None	Mobile Phone None	Work Phone None	
Assistant Bodovetz, Jennifer	Researcher Velvet Help	Items Per Page 50	Common Function Tags
LinkedIn Status Not Connected (Connect)			

If you are not automatically logged in, please do so. You'll see this screen once you are logged in:


Robert Stein · [Sign Out](#)

Grant Velvet access to your LinkedIn Account "Robert Stein"

On Oct 13 you granted **Velvet** permission to use your LinkedIn Account.

Click Continue

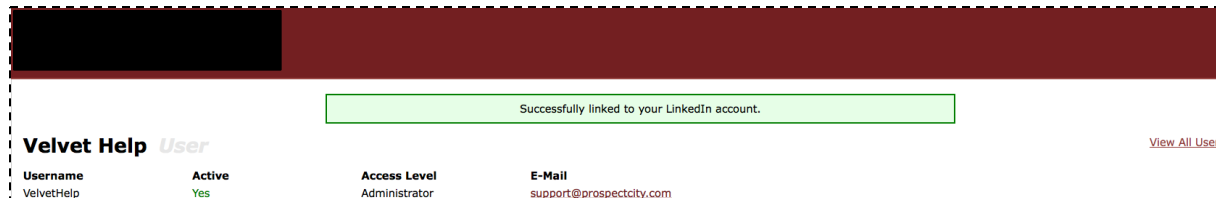
Continue

Revoke Permission

Cancel

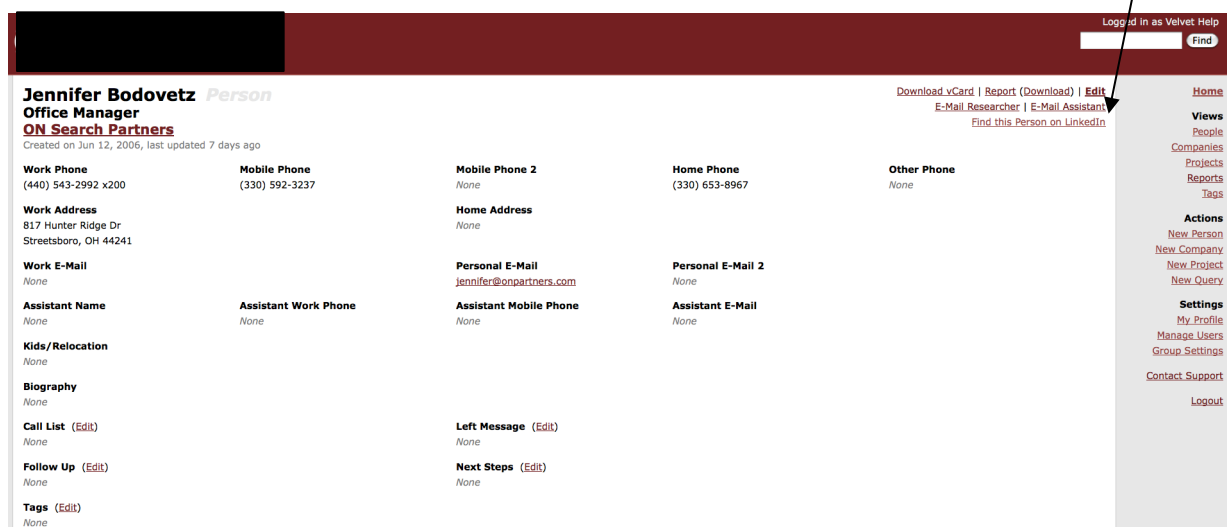
You can always revoke Velvet's access through your [settings](#) page. By granting access you agree to the LinkedIn [Terms of Service](#)

When you click [Continue](#) you'll see the confirmation screen below.

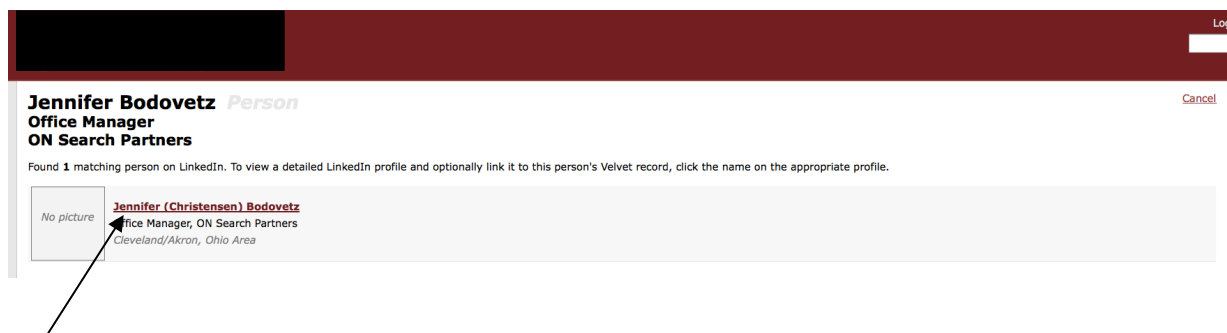


You have now authorized the Database to access LinkedIn using your account.

When you are viewing a person record in the database, notice the new link in the upper right corner.



Click the link and the database will search LinkedIn for a matching record. Example below:



Click on the name to see details.

In some cases multiple results will display, requiring you to select and review the details in order to find the correct person.

Available information from LinkedIn will appear on the screen. (The level of information will vary depending on your account level and the availability of information to the backend connection to the database.)

[<< Back to Search Results](#)
[Import This LinkedIn Profile Data](#) | [Link to This LinkedIn Profile Only](#)

Jennifer (Christensen) Bodovetz *LinkedIn Person*
Office Manager
ON Search Partners

Biography
 None

Titles

Title	Company	Started	Ended
Office Manager	ON Search Partners	2006-07-01	Current

Base: None Bonus: None Other: None

Education
 No education entered

Option One

User may import the existing LinkedIn information into the person's database record in Velvet.

WARNING: to avoid overwriting existing data in the database, this process can create duplicate job titles, for example, and may require a cleanup upon completion.

Option Two (recommended)

User can link the record in Velvet with the record in LinkedIn permanently. Going forward this will allow users to click a link within the person record to check their status in LinkedIn, effectively jumping back and forth between records.

Records will be forever linked for users who have authorized their LinkedIn accounts in Velvet.

In the future, viewing a person record will look like this:

[Download vCard](#) | [Report \(Download\)](#) | [Edit](#)
[E-Mail Researcher](#) | [E-Mail Assistant](#)
[Un-link LinkedIn Profile](#) | [View this Person on LinkedIn](#)

Jennifer Bodovetz *Person*
Office Manager
ON Search Partners
 Created on Jun 12, 2006, last updated less than a minute ago

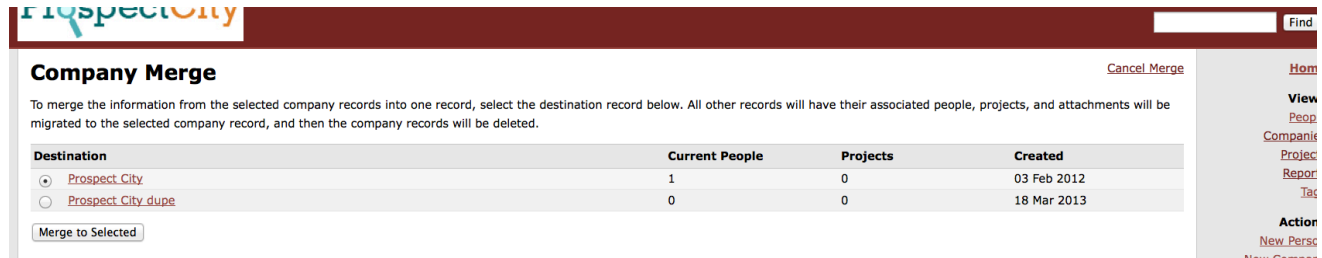
Work Phone (440) 543-2992 x200	Mobile Phone (330) 592-3237	Mobile Phone 2 None	Home Phone (330) 653-8967	Other Phone None
Work Address 817 Hunter Ridge Dr Streetsboro, OH 44241	Home Address None			
Work E-Mail None	Personal E-Mail jennifer@onpartners.com			Personal E-Mail 2 None
Assistant Name None	Assistant Work Phone None	Assistant Mobile Phone None		Assistant E-Mail None
Kids/Relocation None				
Biography None				
Call List (Edit) None	Left Message (Edit) None			

NOTE:

Users can un-link the connection between this person record and the linkedIn record by clicking the un-link button above.

New Administrative Tools

Merging People and Company Records is easy with Velvet. Wherever a user finds a list of people or companies and suspects a dupe is listed, the user simply goes into the record and selects it for merge. Then the user goes into the other duplicate record and selects it for merge. A link will then appear at the top right called “Begin Merge”. When the user clicks that link Velvet will display the final step of the merge process:



Destination	Current People	Projects	Created
<input checked="" type="radio"/> Prospect City	1	0	03 Feb 2012
<input type="radio"/> Prospect City dupe	0	0	18 Mar 2013

[Merge to Selected](#)

[Cancel Merge](#)

[Home](#)

[View](#)

[People](#)

[Companies](#)

[Projects](#)

[Reports](#)

[Tags](#)

[Action](#)

[New Person](#)

[New Company](#)

The user then selects the “keeper” record and the merge will begin. This process will move people records, projects and attachments before the non-selected company record is deleted.

Merging People works exactly the same way, merging memos, project associations and job titles. If conflicts occur, Velvet will favor the destination record.

Import Tool

Velvet now has a feature that allows administrative users to import person records from csv files (or .xls). A template is provided by Prospect City along with user training for this process. It is recommended this process be limited to users with expertise and authority since imports are not reversible.

See next page for instructions.

INSTRUCTIONS FOR IMPORTING .CSV PEOPLE RECORDS INTO VELVET

IMPORTANT: THIS PROCESS IS NOT REVERSABLE. ANY IMPORTS COMPLETED ARE PERMANENT.

User must have Administrator permissions to facilitate import process.

From the main home screen, retype the URL as follows:

`http://yourconame.velvetsite.com` (press enter)

You will see the following screen:

Person Import Tool

To begin, choose a Comma-Separated Values (CSV) file of person records to upload. You will be shown a list of the validated person records and associated information before importing.

The following field names will be recognized. Field names can have mixed case and/or spaces ("First Name" will be recognized as the "firstname" field). Each row in the CSV must have at least a person's last name defined in order to create a record. No verification of duplicate person names will be performed.

For person and company addresses, the address must have at least a city to be created. Those with just a state or other information will not be saved as an address.

Person's Name

- **salutation**
Salutation (e.g., Mr., Mrs.)
- **firstname**
First name
- **middlename**
Middle name or initial
- **lastname**
Last name
- **suffix**
Suffix (e.g., Jr., Sr.)

Person's Phone Numbers - may be formatted ("(123) 555-1234") or unformatted ("1235551234")

- **directphone**
Direct phone number
- **workphone**
Work phone, without extension
- **mobilephone**
Mobile phone number
- **homephone**
Home phone number
- **fax**
Fax number

Person's Contact Methods

- **workemail**
Work e-mail address
- **personalemail**
Personal e-mail address
- **url**
Personal web address URL

The headers in your spreadsheet must match the field names listed above in order to successfully import data. In addition, some fields require specific formatting, codes, etc. Without an exact match to the required codes or formats, those records will not import correctly.



Using Excel Spreadsheets

Because Velvet requires all import files be in .csv format, open your spreadsheet in Excel so we can convert it.

Once the file is open, click “File” then “Save As...”

Go to the file format/type drop-down and select .csv format, or “comma separated values”. You can rename your document, but it is not necessary. Now save the new csv file to your computer.

Go back to the browser, Velvet import screen.

Click the “browse” button and find the newly-saved .csv file you just created. Select it. Now click the import button.

After a pause while the system analyzes the data it will generate a results screen. (note: it has not imported yet, it has only analyzed the results)

Errors are listed here. These rows were NOT imported

Person Import Tool - Preview					
Out of 213 rows in the CSV, 213 persons were parsed.					
The following warnings were generated:					
● Row 131: Function tag "Dx-Commerical" does not exist.					
Last Name	First Name	Current Title	Current Company	Project	Project Status
Adelman	Daniel	Senior Vice President Development and Chief Medical Officer	Alvine Pharmaceuticals, Inc.	On-Q-ity CBO 02-001: Chief Business Officer	Source-P&A
Anderson	William (Bill)	Vice President Sales and Marketing	Genentech (Similar)	On-Q-ity CBO 02-001: Chief Business Officer	Nomination-Other
Andrews	Patricia	Executive Vice President and Chief Commercial Officer	Incyte (Similar)	On-Q-ity CBO 02-001: Chief Business Officer	Research ID-T2
Arkowitz	David	Executive Vice President, Chief Financial Officer and Chief Business Officer	AMAG Pharmaceuticals, Inc.	On-Q-ity CBO 02-001: Chief Business Officer	Research ID-T1
Artuso	Anthony	Vice President, Strategy, Business Development and Marketing Services	EMD Serono (Similar)	On-Q-ity CBO 02-001: Chief Business Officer	Potential Prospect-Contacted
Aspinall	Mara	President	Ventana Medical Systems, Inc. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Client
Baracchini	Ed	Chief Business Officer	Xencor, Inc. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Research ID-T2
Barone	Paul	Vice President, Business Development	Celldex Therapeutics (Similar)	On-Q-ity CBO 02-001: Chief Business Officer	Research ID-T1
Bashall	Anthony (Tony)	Executive Vice President, Technology and Corporate Development	Securetek Corp. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Potential Prospect-Contacted
Becker	Steve	Director, Sales and Marketing	Athena Diagnostics, Inc. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Source-P&A
Been	Kees	President and Chief Executive Officer	Envivo Pharmaceuticals, Inc. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Source-P&A
Behrens	Jeff	Senior Director, Business Development and Operations	Edimer Pharmaceuticals, Inc. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Research ID-T2
Berlin	Kenneth (Ken)	President and Chief Executive Officer	Rosetta Genomics, Inc. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Source-P&A
Bistras	Remis	President	Walden Vision, LLC (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Research ID-T2
Bloom	Steven	Vice President, Business Development	Ziopharm Oncology (Similar)	On-Q-ity CBO 02-001: Chief Business Officer	Candidate-Active
Boccuzzi	Steve	Vice President	Medco Health Solutions, Inc. (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Reference-Final
Bolino	Paul	Vice President, Oncology R&D Business Development	GlaxoSmithKline, PLC (Similar)	On-Q-ity CBO 02-001: Chief Business Officer	Research ID-T3
Bondaryk	Robert (Bob)	Chief Operating Officer	Keranetics, LLC (Entered)	On-Q-ity CBO 02-001: Chief Business Officer	Source-P&A
Booth	Mark	Chief Commercial Officer	Orexigen Therapeutics Inc.	On-Q-ity CBO 02-001: Chief Business Officer	Source-P&A

NOTE: IF VELVET GENERATES ERRORS AT THE TOP OF THE SCREEN, USERS CAN SIMPLY ABANDON THE PROCESS AND CORRECT THE ERRORS IN THE SPREADSHEET AND START OVER.

Before completing the process, the database requires the user to review and set/approve any questionable or conflicting company names on the list.

Conflicting or questionable names are listed in drop-downs on the screen:

Each drop-down will have company names to be resolved:

Definitions:

(Similar) = Velvet has found a similar name already existing in the database. Select this if you want to add this person under that existing company.

(Entered) = This is the EXACT company name as entered in the spreadsheet. Selecting this will create a new company record with this name in it.

VERY IMPORTANT: If the user determines a (similar) company name is actually the correct match, even though spelling may be slightly different, we suggest selecting the (Similar). Later, if the company name should be corrected to a formal spelling, the user should do this by editing the company record in Velvet.

REMEMBER, selecting (Entered) will ALWAYS create a new company record for that individual.

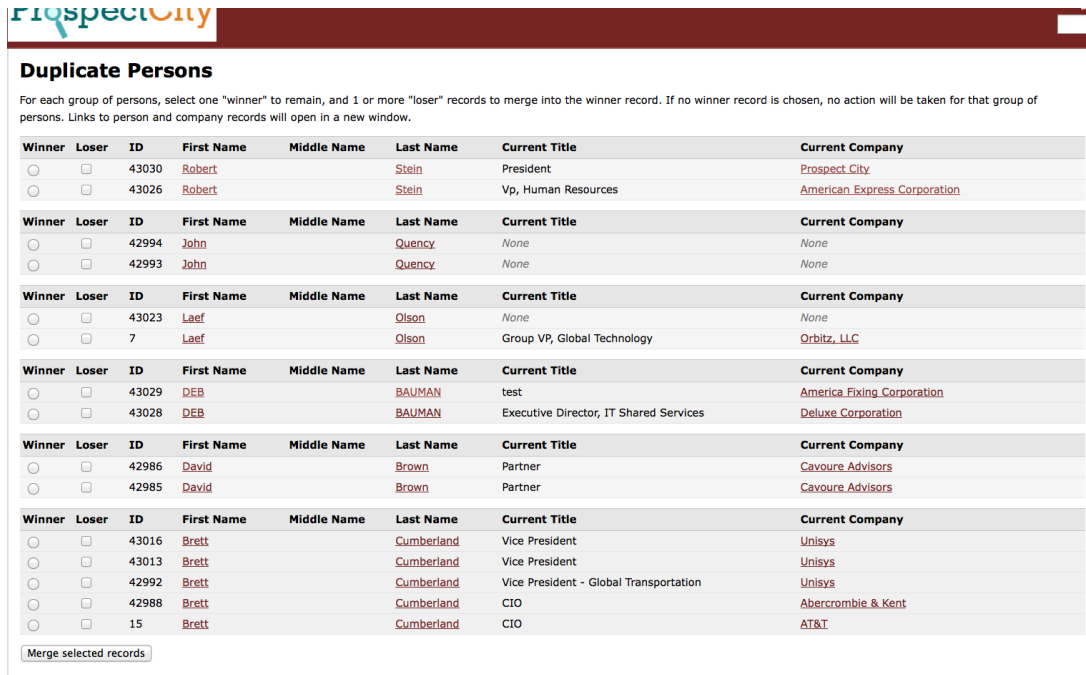
USER can go through the entire list and check each company selection from the drop-down to be sure the correct one is selected.

UP TO THIS POINT THE USER CAN ABANDON THE PROCESS WITHOUT IMPORTING DATA BY LEAVING THE SCREEN.

Once the list is completed, the user can IMPORT the list by clicking "Import These Persons" at the bottom of the screen.

You will receive verification the process was completed, and a list of all the imported records will be displayed.

Finding Duplicate People Records is easy with Velvet. Users can now run a report to find duplicate people records. Velvet will search for common names and nicknames in order to display possible duplicates. From there users can decide how to correct, merge or delete records. Click the link on the right side menu called “Find Dup Persons”



Duplicate Persons

For each group of persons, select one "winner" to remain, and 1 or more "loser" records to merge into the winner record. If no winner record is chosen, no action will be taken for that group of persons. Links to person and company records will open in a new window.

Winner	Loser	ID	First Name	Middle Name	Last Name	Current Title	Current Company
<input type="radio"/>	<input type="checkbox"/>	43030	Robert		Stein	President	Prospect City
<input type="radio"/>	<input type="checkbox"/>	43026	Robert		Stein	Vp, Human Resources	American Express Corporation
<input type="radio"/>	<input type="checkbox"/>	42994	John		Quency	None	None
<input type="radio"/>	<input type="checkbox"/>	42993	John		Quency	None	None
<input type="radio"/>	<input type="checkbox"/>	43023	Laef		Olson	None	None
<input type="radio"/>	<input type="checkbox"/>	7	Laef		Olson	Group VP, Global Technology	Orbitz, LLC
<input type="radio"/>	<input type="checkbox"/>	43029	DEB		BAUMAN	test	America Fixing Corporation
<input type="radio"/>	<input type="checkbox"/>	43028	DEB		BAUMAN	Executive Director, IT Shared Services	Deluxe Corporation
<input type="radio"/>	<input type="checkbox"/>	42986	David		Brown	Partner	Cavoure Advisors
<input type="radio"/>	<input type="checkbox"/>	42985	David		Brown	Partner	Cavoure Advisors
<input type="radio"/>	<input type="checkbox"/>	43016	Brett		Cumberland	Vice President	Unisys
<input type="radio"/>	<input type="checkbox"/>	43013	Brett		Cumberland	Vice President	Unisys
<input type="radio"/>	<input type="checkbox"/>	42992	Brett		Cumberland	Vice President - Global Transportation	Unisys
<input type="radio"/>	<input type="checkbox"/>	42988	Brett		Cumberland	CIO	Abercrombie & Kent
<input type="radio"/>	<input type="checkbox"/>	15	Brett		Cumberland	CIO	AT&T

Velvet displays a list of possible dupes for your review. Users can tell which records are oldest by looking for the lower ID number. Users can also click on each name to display details in another window for review or comparison.

After deciding which records are winners (keepers) vs. losers (removed) choose to merge records by clicking “merge selected records” at the bottom of the screen.

New Security Options

While our OpenBSD platform is considered highly secure, user login information and passwords are essentially keys allowing access to the system. Velvet has two new security options available for clients who have a greater concern about securing access among users via password login.

Password Change/Reset Requirements

Administrators can set time-initiated password change notifications and expirations for users. When a user approaches the due date for changing their password, Velvet will begin notifying them at each login.

If a user fails to change their password during the warning period the user password will be reset at the expiration date, requiring a reset via Velvet support.

Two-Factor Password Authentication



As experienced with many financial institution logons, two-factor authentication requires the user to authenticate each login using a separate device.

When a user logs into Velvet via the logon screen, Velvet will send a notice to the user via another device. Options include:



In each case Velvet will automatically log the user into Velvet when the response is authenticated via the device, requiring no additional input via the login screen.



Contact your internal support for assistance

or

Contact Prospect City Support at

Support@prospectcity.com

847.487.4256